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Analytic report of distance learning in Brazil

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2017 Brazilian Census for Distance Learning

Analytic Report of Distance Learning in Brazil

Summary

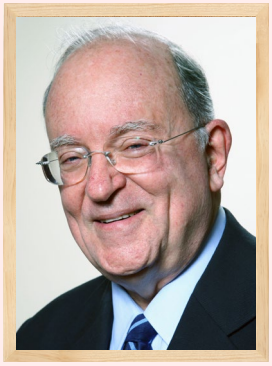
A word from the president

The Brazilian Association of Distance Learning (ABED) leadership is proud to release this 10th Brazilian Census for Distance Learning, an "X-ray" of the group of national organizations dedicated to the practice of teaching those who wish to learn at a distance, that is, through the support of any given kind of technology. Brazil is characterized by the frequent discontinuation of plans, projects and programs, but it is very rewarding to see distance learning (DL) – which is relatively new in the Brazilian educational market – standing out and growing in number of students and organizations involved and increasing its credibility in society in general due to the great work that has been done, as well as becoming more and more consolidated in the production of research about the phenomenon of learning in a more flexible way. This study is just an example of how this community of professionals, united under the flag of ABED, contributes to these advances.

We currently have ten editions of this annual report, available in print and digital format, allowing DL researchers and managers to identify relationships among the elements reported, as well as seek to publish their own observations and conclusions or modify the pedagogical practices of their organizations. Similarly, managers of educational institutions and companies that sell products and services for DL must go over the data herein aiming to check whether their institutions' practices of student relations are at least equal, or superior to relations involving suppliers and customers.

With the purpose of to be always aware of the informational needs of our community of professionals and institutions, we kindly ask for your feedback on this Census, in order to guide us to new focus topics for future surveys, going beyond the three main areas traditionally approached (pedagogy, technology and management).

Finally, we must not forget to acknowledge the members of this report's production team, publicly offering our deepest gratitude for a group work well done, which includes phone and email support to respondents, correction of eventual issues in the online data collection software, communication with vendors and help in divulging the finished material. Thus, our special thanks go to the Census coordinator Betina Von Staa, ABED's executive secretary Beatriz Roma Marthos, and administrative assistants Alessandra Pio, Maurício de Lima Aguiar, Ozeias da Silva and Ariane Prado Vasconcelos.



Fredric M. Litto
Presidente, ABED

Advantages and risks of an accelerated pole expansion in 2017

Cristiana Mattos Assumpção

With the new 2017 regulation, the offer of on-site support hubs is no longer mandatory, while accredited institutions were able to increase their number of hubs without the requirement of on-site approval by Brazilian Ministry of Education. The result was a significant increase of on-site hubs in 2017, establishing a broader geographical reach of the institution both in locations where it is already present and in new locations. It was observed that these hubs play a strong role of student administrative and pedagogical support, being a space for social interaction and collaborative work.

These data are not surprising, considering human being's strong need to live in society and to interact with their peers face to face. The advantages of this accelerated expansion of hubs lie precisely in the creation of this humane space, not mediated by screens, where students can feel cared for and seen, having human contact with their peers and with authorities that can help them carry out their dream of a good education.

For educational institutions, this flexibility made it easier to attract more students both in the city where it already operates and in other regions, expanding their geographical presence. The quickness of this expansion leads us to believe that there was a repressed demand that was able to be met once Ministry of Education made their regulations more flexible.

At the same time this has brought advantages, there were risks that must have been examined, especially with regard to the quality of the services offered at the hubs. It is necessary to implement of quality control mechanisms for these services, which is in the best interest of the institution, so that these hubs do not promote negative marketing for their brand. Because education is a service sector, hub expansion has demanded the hiring of skilled labor for the designated roles, plus adequate infrastructure to enable students to be well served and to be comfortable in performing their work. For private institutions, it is necessary to examine whether the courses offered will not suffer an increase in price in order to cover for the increased costs. In the case of public institutions, we should understand the budget increase and how this will be covered.

Another aspect to be considered is the maintenance of these hubs; it is necessary to monitor whether quality will be maintained over the years.

It will be interesting to follow the progress of this expansion trend to see whether the same accelerated pace, as well the impact on recruiting and maintaining students, will continue over the next few years, thus justifying the increased costs and the investments being made now. It will also be important to monitor the quality of the services that the hubs are offering and their maintenance, so that we can continue to guarantee the highest quality education in all modalities.

About the author

Cristiana Mattos Assumpção has a bachelor's degree in Biological Sciences from the São Paulo University and a master's and a doctorate's degree in Instructional Design and Media from Columbia University in New York. Member of the manager board of Praxis Community and member of scientific committees in many organizations, including the ABED as director, the American Educational Research Association (AERA), the MoodleMoot, the Horizon Report K12 (2010 to 2017) and the Horizon Report Technology Outlook Brasil (in 2014, 2017 and 2012). She takes part in many national and international congresses presenting works in the fields of science, educational technology and distance learning in primary education.

What are the initiatives that help reduce distance learning dropout rates?

João Mattar

"Student Dropout: the Elephant in the Room". This is the title of the chapter by Alan Woodley and Ormond Simpson that closes the book *Online Distance Education: Towards a Research Agenda*[1]. In an informal conversation, the two Open University researchers discuss dropouts and low completion rates in distance learning courses.

Why an elephant? Because this is a big problem! The Open University graduation rate, according to the authors, is 22%, versus 82% for full-time students at UK universities. Internationally, these graduation rates in distance learning (DL) would be close to 10%, and decreasing. "Clearly, we need far more research into what happens to distance students. But at the moment it seems safe to assume that average graduation rate in distance learning are lower than those in conventional education by a considerable fraction." (Woodley, Simpson, 2014, p. 461).

And there is a social cost associated with school dropouts, which involves the relative probability of depression, unemployment and, for women, domestic violence.

> My suspicion is that many distance education students are already partial casualties of our education systems and are studying to try to overcome the consequences of their previous education. So dropping out may actually add to their negative learning experiences and view of themselves. (Woodley; Simpson, 2014, p. 475)

Dropouts are one of the main problems faced by DL, for which it is not possible to identify a single cause. In addition, although Woodley and Simpson make suggestions for intervention, they acknowledge that they have not been sufficient to bring DL completion levels to the same levels of on-site education. There are no easy solutions, partially because we need to strike a balance between the cost of interventions and their results, both to guide investments and to ensure that these interventions can be integrated into the institutions' ongoing actions. In this sense, the authors propose that this theme should be incorporated into an international research agenda that seeks to measure the impact of the different types of interventions on the completion rates of distance learning courses.

And why in the room? Because, despite the size of the problem, it remains hidden, invisible and neglected, with little discussion in DL. But this modality institutions need to recognize and address the problem by nudging this elephant. It is of course difficult to consult the students who have given up, and their answers may not actually point to the actual reasons for dropping out. Either way, it is essential to understand the profile of the student who drops out, as well as their reasons for doing so. For Woodley and Simpson (2014, p. 465), for example, the Fordist model would be one of the causes of distance learning dropouts:

> By the time the modules are running, the academics are writing new courses and it is the tutors who have to pick up the pieces. I fear that this distance between students and course creators, a feature of many industrial model forms of distance education, may be an unfortunate bi-product of this model.

And what does ABED's Census have to tell us about these issues?

First, that educational institutions are not aware of the students' dropout reasons. Among accredited full DL courses, 59% of institutions respond that they are not aware of the reasons, or did not answer the question. As for accredited blended courses, this number rises dramatically to 71%. And for on-site courses, it is lower, 51%.

1 WOODLEY, A.; SIMPSON, O. Student Dropout: the Elephant in the Room. In: ZAWACKI-RICHTER, O.; ANDERSON, T. (Ed.). **Online Distance Education**: Towards a Research Agenda. Athabasca: AU Press, 2014. p. 459-483.

Table 1 – Number of institutions that have declared awareness of dropout reasons

	Full distance learning	Blended	On-site
Yes	137	96	169
No	36	20	56
Not informed	162	219	116

Regarding dropout rates, 51.43% of institutions offering full DL courses and 65.98% of those offering blended courses did not answer the question (Table 2). In this sense, the Census seems to indicate that there are more problems related to dropouts in blended courses than in full DL. In addition, in previous editions of the Census, the resistance of educational institutions to provide information on dropouts has been noticed, reinforcing the idea of the elephant in the room.

Table 2 - Dropout rates, in percentage of institutions

Dropout range	Full distance learning (%)	Blended (%)	On-site (%)
0%-5%	5.65	5.82	11.14
6%-10%	7.35	5.70	12.32
11%-15%	4.71	6.09	9.97
16%-20%	6.14	3.63	6.16
21%-25%	7.40	2.81	5.87
26%-50%	6.85	4.70	2.64
51%-75%	1.13	0.43	0.59
76%-100%	0	0	0
Not applicable	1.24	0.94	1.17
Not available	8.11	3.90	18.18
Not informed	51.43	65.98	31.96
Total	**100**	**100**	**100**

It is also observed that dropout rates are higher in distance and blended courses compared to on-site courses, especially if we consider that in the first two cases there are a large number of institutions that did not report information.

Although Woodley and Simpson (2014) argue that there is little research on the subject, a Google Scholar search conducted on May 18, 2018 with the phrase *allintitle: dropouts "distance learning" OR ODL* returned 86 results. In any case, it is worth highlighting the need for research efforts dedicated to changing retention rates in DL.

Back to the initial question: what are the initiatives that may help reduce distance learning dropout rates?

For Woodley and Simpson (2014, p. 476), "The way a distance course is structured, its workload, its assessment strategies and its style of writing, must all affect its retention rate.". One of the possible vectors of interventions would be continuing education of teachers, tutors, student support teams and administrators. Informing students clearly about the characteristics of the courses in which they intend to enroll, carry out admission tests and work on motivation are other propositions made by the authors. "If I had to advocate a single strategy to reduce dropout rate, I would phone up the students on a regular basis and ask them how they are doing." (Woodley, Simpson, 2014, p. 470). For the authors, retention would most often be the result of proactive motivational support from the institution, although many of the institutions' efforts are reactive, waiting for students to contact them and ask for help.

Finally, it is up to us, DL professionals, to not only to recognize the elephant in the room, but to nudge it!

About the author

João Mattar is a director of Scientific Development at Brazilian Association of Distance Learning (ABED). Professor, research director and researcher in the Master's Program in Education and New Technologies at Centro Universitário Uninter and at Tecnologias da Inteligência e Design Digital (TIDD) of Pontifícia Universidade Católica de São Paulo (PUC-SP).

What is ABED's role in discussing the quality of distance learning in Brazil?

Mauro Pequeno

The new federal law of distance learning (DL), through Decree n. 9.057 of May 25th 2017, among other determinations, allows higher education institutions to expand the offer of undergraduate and graduate DL courses. Among the main changes introduced by the Decree are the creation of DL hubs by the institutions themselves and the accreditation of institutions in the DL modality without requiring prior accreditation for on-site learning.

This regulation also allows institutions to offer exclusively distance learning courses, without the simultaneous offering of on-site courses, as determined by the previous law. The Brazilian Ministry of Education acknowledges that the main intention of this flexibility is to increase the country's higher education offer to achieve Goal 12 of the National Education Plan (PNE), which requires raising the gross enrollment rate in higher education to 50% and the net rate to 33% of the population aged 18 to 24 years. This growth, pointed out in the 2017 Census, indicates that the total number of enrollments, together with the increase of hubs and the broader definition of blended courses, also shows a very significant growth, reaching 7,773,828 students.

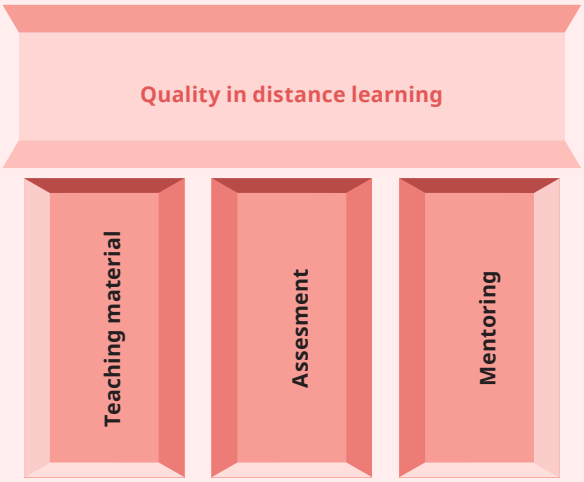
The historical series with the total enrollment volume counted by this Census since 2009 confirms this growth based on this new MEC stance. For more information, see Chart 4.7, presented in Part 4 of this Census.

Given this fact, and taking into account the significant increase in supply, it is crucial that quality becomes a preponderant factor in this scenario.

Quality in distance learning

For a long time, studies on the quality of DL focused on three pillars considered essential for the provision of a quality course: teaching materials, mentoring and assessment. According to Oliveira and Rosini (2010)[1], these three interconnected pillars form a triad:

Figure 1 – The three basic pillars for quality in distance learning



Source: Based on Oliveira; Rosini, 2010.

However, new research points to a new pillar: the methodology employed.

Active methodologies

The advent of digital technologies, increasingly present in everyday life, has brought about changes in our perceptions of the world and in our interactions with each other, as well as in our political, economic and social relations. The new connected generation prefers the role of protagonist rather than that of spectator. Courses need to be adapted to this new need. Hence the use of active learning methodologies.

1 OLIVEIRA, A. R.; ROSINI, A. M. Tutoria: um indicador para a qualidade em EAD. In: CONGRESSO INTERNACIONAL DE EDUCAÇÃO A DISTÂNCIA, 16., 2010, Foz do Iguaçu. Disponível em: <http://www.abed.org.br/congresso2010/cd/252010094805.pdf>. Acesso em: 22 jun. 2018.

According to Xanthopoylos (2017)[2]:

> Active methods put the self-educating student in the foreground, seeking to work their way in learning through paths such as the inverted classroom, PBL, games, blended or learning, simulators and technologies based on virtual reality, augmented reality, Learning Analytics, among others. [own translation]

The use of active methodologies aligns with the profile of current students, who wish to learn with greater engagement and participation. Access to technological resources provides conditions for information to become increasingly available. In addition, students participate in the production of videos, texts, images and multimedia materials in social networks and applications. This technology potential should be used to engage students in the production of knowledge and in assigning meaning to the content they need in their professional training. Thus, technologies enhance the approaches offered in active methodologies.

One important concern is the quality of training offered in courses that use active methodologies. They should be appropriately known to teachers. Similarly, the material and technology must offer the necessary conditions for their best use.

Along these lines, ABED has been contributing to the dissemination and promotion of actions that increasingly encourage the use of different types of active methodologies.

ABED and active methodologies

Among the actions that ABED promotes to encourage the use of active methodologies, we mention CIAED 2017, in which the main theme was "Active methodologies and technologies applied to education". At this congress, mini-courses were offered, and there were lectures and presentations of innovative experiences.

In addition to this congress, ABED directors have been offering courses and seminars on active methodologies, contributing greatly to its dissemination and its correct use, so that the best results are obtained.

About the author

Mauro Pequeno holds a bachelor's degree in Civil Engineering, a master's degree in Computer Science and a PhD in Electrical Engineering. Professor at the Federal University of Ceará (UFC), chair of the UFC Information Technology Policy Commission, member of the Commission for the Implementation of the Electronic Information System (SEI) of UFC, ad hoc consultant for the State Science and Technology Support Foundation of Pernambuco, the Cearense Foundation for Research Support, the National Council for Scientific and Technological Development (CNPq), the Coordination for the Improvement of Higher Education Personnel (CAPES), and the Research Support Foundation of the State of Paraíba. Coordinator of the Open University of Brazil (UAB) Program at UFC, director of the UFC Virtual University Institute and ABED director, as well as member of the Institutional Management Committee for Initial and Continuing Professional Training at UFC and the Management Committee of the Distance Learning Center of the State of Ceará. Member of the editorial board of the journals *Revista Brasileira de Aprendizagem Aberta e a Distância* (RBAAD/ABED), *Revista Brasileira de Informática na Educação* (RBIE.SBC), *Revista EAD em Foco* (CECIERJ), *Revista Educação e Pesquisa* (USP), *Revista Tecnologias, Sociedade e Conhecimento* (NIED/UNICAMP), *Revista Novas Tecnologias na Educação* (RENOTE/UFRGS), *Revista Informática na Educação: Teoria & Prática* (UFGRS). In 2017, at the 25 years of Internet.com, in Brasilia, he received the title of recognition for his essential role and important contribution in the construction and development of the Brazilian Academic Network and Internet in Brazil, in the areas of Use of Information Technologies and Communication in Education, as well as Distance Learning.

2 XANTHOPOYLOS, S. P. Metodologias ativas e tecnologias aplicadas à educação. In: CONGRESSO INTERNACIONAL ABED DE EDUCAÇÃO A DISTÂNCIA, 23., set. 2017, Foz do Iguaçu. Disponível em: <http://www.abed.org.br/hotsite/23-ciaed/pt/apresentacao>. Acesso em: 22 jun. 2018.

Is it possible to offer quality distance learning in an extremely price-competitive environment?

Carlos Longo

Over the past 10 years, we have been living a context of profound changes in Brazilian higher education. The strengthening of FIES from 2010 to 2015 caused an expressive average growth in on-site higher education. As for distance learning (DL), in the same period the modality suffered a reduced growth from 16% to 9% a year.

On the other hand, because of an outdated and restrictive legislation, higher education institutions (HEI) used to need an average three to four years to be accredited and authorized to offer DL courses. Those already accredited took up to five years to expand their on-site support hubs. From 2014 to 2017, a institution needed two years to get authorization for up to 20 hubs, as per the SERES calendar and after on-site visits, depending on the IGC and CI of the higher education institution.

The update in the distance learning legislation and publication of Decree n. 9,235, of December 15th 2017, changed this scenario, in which the growth in the offer of DL courses occurred mainly from HEI acquisitions. Some examples are the acquisition of UNOPAR and UNIASSELVI by the Kroton Group, and the acquisition of UNIOC/SEB by Estácio de Sá University, among many other acquisitions and fusions in the last ten years. Now, at the end of the second decade of the 21st century, we are seeing an accelerated expansion of HEIs and DL hubs. We from around 5,000 accredited hubs in late 2016 to almost 14,000 hubs registered in the E-MEC system in May 2018. But most of them are still unoperational, or are not yet offering DL courses.

This change in the law contributed for a more balanced competition, with more options for students seeking a chair in higher education. In addition, many HEIs with good local and/or regional reputation now have more chances of competing with lower entry costs, with the so-called “massive HEIs”, which are already offering courses in DL in almost the entire country.

The entry of highly recognized local/regional HEIs is also causing a better perception of quality in DL by the local public. However, this growth brings with it an expectation of lower prices, since the creation of an intense competitive environment and the offer of courses and spots much higher than the existing demand has been causing, among other issues, a war of discounts and offers that cause lower average prices, higher advertising costs, reduced profits margins for HEIs and, with it, lower capacity for investments in DL.

In this new competitive environment, we must note that large HEIs, which offer massive DL courses throughout the country, will further consolidate their position with large market shares. Currently, the six largest HEIs offering DL higher education courses in the entire country hold 75% of all enrollments in this modality in Brazil. It is understood that there can be no growth in number of students in an economically viable way for new HEIs in the national DL scenario.

What now? Is it really not possible to offer high quality DL in this price-competitive environment?

We see the beginning of a new era of methodology innovation and growth in the offer of high quality courses in this modality. However, not completed mediated at a distance, but in the blended modality. In this modality, students can study and practice in virtual learning environments (VLEs) and, periodically, have on-site meetings in innovative environments or labs, where learning practices and experiences are built with active methodologies and on-site group exercises. In these environments, the student becomes the protagonist of his own learning, and the teacher plays the role of learning facilitator and coach. He uses his experience to support the groups of students in the process of “learning how to learn” in an autonomous and creative way.

Recent studies presented by the consulting firm Educa Insights at the 11th Brazilian Congress on Private Higher Education show strong evidence that the future of growth and quality of higher education in Brazil, following a worldwide trend, is blended learning.

The study shows results that reinforce the perception of this trend for the sustainable growth of blended courses (see Table 1). Although it is possible to see that survey participants ignore the meaning of blended course, when blended learning is explained to them, they show strong intentions to try this new model of higher education. Educa Insights also presented a projection for growth in the number of students in higher education (see Chart 1). It is estimated that blended learning should be significant in the next five years.

Although blended courses are still not adequately understood by the general public, a proposition of a learning format consistent with the students' lifestyle is always welcome. In blended learning, students should find a well structured virtual learning environment, with learning tracks that promote their individual development to work in groups during on-site meetings with adequate and flexible frequency.

There are already blended models in some Brazilian HEIs, in which the student goes over the theory in the VLE and prepares for the on-site meeting every two weeks. In these meetings, students come together in differentiated classrooms, have group experiences using active methodologies or practice labs. These practices add to their personal development and promote networking in a collaborative way in a locally/regionally well-known HEI.

Yes! This is the answer to the provocative question in this article's title. Youths and adults seeking quality higher education are increasingly more willing to pay a higher price than what is practiced today in full DL. But this commitment is for an education where information and communication technologies are used in order to add value to the teaching and learning process. The technologies aforementioned should optimize these students' time as well as the old, now renewed classroom, in which teachers and students share experiences and learn to develop new skills, multiplying their individual abilities, becoming protagonists of their future and society as a whole.

Table 1 – Results of the survey by Educa Insights on blended courses

Have you heard of blended courses?				**(After explaning what a blended course is) Would you consider taking a blended course?**			
	Yes	**No**	**Total**		**Yes**	**No**	**Total**
Brazil	23%	77%	100%	Brazil	70%	30%	100%
São Paulo	38%	62%	100%	São Paulo	82%	18%	100%
Rio de Janeiro	25%	75%	100%	Rio de Janeiro	71%	29%	100%
Brasília	28%	72%	100%	Brasília	61%	39%	100%
Salvador	25%	75%	100%	Salvador	58%	42%	100%
Fortaleza	25%	75%	100%	Fortaleza	60%	40%	100%
Belo Horizonte	18%	82%	100%	Belo Horizonte	70%	30%	100%
Manaus	30%	70%	100%	Manaus	84%	16%	100%
Curitiba	22%	78%	100%	Curitiba	74%	26%	100%

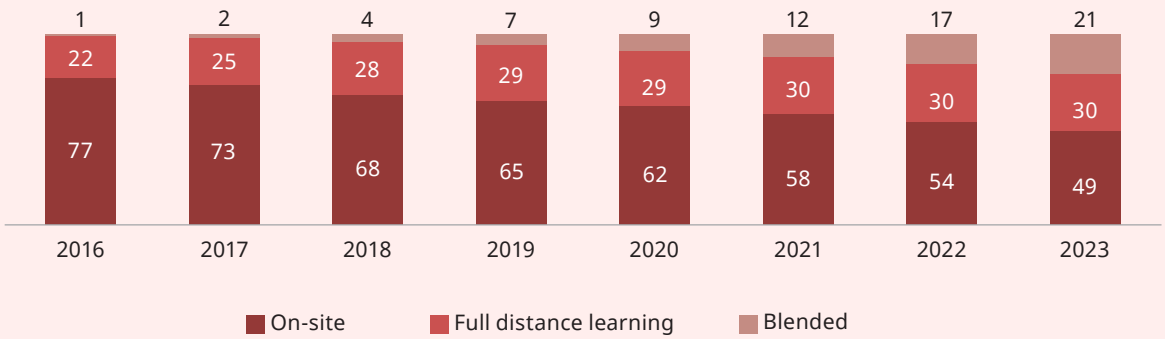
(continue)

(Table 1 – conclusion)

Have you heard of blended courses?				(After explaning what a blended course is) Would you consider taking a blended course?			
	Yes	No	Total		Yes	No	Total
Recife	24%	76%	100%	Recife	63%	37%	100%
Porto Alegre	19%	81%	100%	Porto Alegre	74%	26%	100%

Source: Adapted from Trivelato, 2018.[1]

Chart 1 – On-site, full distance learning and blended courses: projection for total enrollments in private HEIs



Source: Trivelato, 2018.

About the author

Carlos Longo is a civil engineer with an *master in business administration* (MBA) and a PhD in Management, emphasis in Service Quality, from Newcastle University, England. Professor and assistant dean at Universidade Positivo. National DL director at Laureate International Universities in Brazil. He has worked as executive learning director at Grupo Ibmec Educacional S/A, being responsible for the Ibmec Online DL program and for the Corporate Solutions Program. Responsible for the MBA and *certificate in business administration* (CBA) programs in Rio de Janeiro, Belo Horizonte and Brasília. He has also worked as senior vice-president of DL at Whitney International University System, based in Dallas, USA. For ten years, he has worked at the Getulio Vargas Foundation, where he created and directed the FGV online program. He has also developed and managed the Executive Learning Quality Center at FGV. Currently an Brazilian Association of Distance Learning (ABED) director, he represents them at Instituto Nacional de Pesquisas Espaciais (INPE) and Conselho Nacional de Educação (CNE) commissions for defining the guidelines for DL regulation. In November 2007, the Institute for Advanced Research in Education (IPAE-RJ) awarded him with the Recognition in Education award in the Distance Learning modality.

1 TRIVELATO, L. Se o híbrido é a solução, qual é o problema? In: CONGRESSO BRASILEIRO DA EDUCAÇÃO SUPERIOR PARTICULAR, 11., jun. 2018, Ilha de Comandatuba. Disponível em: <https://cbesp.com.br/wp-content/uploads/2018/06/Educa-Apresentac%CC%A7a%CC%83o-CBESP-XI.pdf>. Acesso em: 24 jul. 2018.

Why is “thorough and updated content” the top item in the list of elements associated with quality in distance learning?

Luciano Sathler

In times of falsehoods and half-lies disseminated over the most diverse media by robots and ill-intentioned people, we must be certain that the content of a course is scientifically reliable. Or, at least, that it was critical and previously evaluated by teachers trained to do so. This applies both to on-site and distance learning (DL).

Shallow, fast searches on engines like Google are within everyone’s reach. The exponential growth in the volume of information available and the speed with which it spreads reached unprecedented levels. This inflation of possibilities can confuse more than clarify in the educational context.

Due to the characteristics of DL, a basic condition for the perception of quality is content that is academically respectable, comprehensible to the student, articulated and coherent with the learning objectives, that is interesting, continuously updated, relevant, with intuitive and friendly access.

In DL, quality cannot be exclusively tied to the assessment of what was previously determined by a specialist. The possibility of students’ active participation in selecting, drafting and updating content is more important than its mere reception.

This is one of many reasons why self-instructional courses are not recommended for higher education, as they do not consider as fundamental in their organization the continuous synchronous or asynchronous interaction between teachers and students.

In this context, it is up to the teaching staff to engage in a permanent research dynamic that goes beyond technical or practical rationality to establish an epistemological relationship between the subject of knowledge and objects in general (Freire, 2017)[1].

The student should be encouraged to adopt critical thinking as an attitude and method for analyzing content, which includes deliberate reflection and judgment. It involves skepticism, argument or suspension toward a statement, established norm or way of doing things.

This critical approach to content contributes to learning. According to Garrison (cited by Yang et al., 2011)[2], critical thinking can be defined as a problem-solving process that is organized into five stages.

1 FREIRE, A. M. A. **Paulo Freire**: uma história de vida. 2. ed. São Paulo: Paz e Terra, 2017.

2 YANG, D.; RICHARDSON, J. C.; FRENCH, B. F.; LEHMAN, J. D. The development of a content analysis model for assessing students’ cognitive learning in asynchronous online discussions. **Education Tech Research Dev**, v. 59, p. 43-70, 2011.

Table 1 – Critical thinking as a problem-solving process

Phase 1: Identification of the problem	Students observe or study a problem, identify elements, and observe their connections to arrive at a basic understanding.
Phase 2: Definition of the problem	Students analyze a problem to arrive at an understanding that clarifies the values, beliefs and assumptions underlying the problem's statement.
Phase 3: Exploring the problem	Students admit or propose an idea based on their connection with propositions already admitted as true by induction and deduction.
Phase 4: Applicability of the problem	Students evaluate alternative solutions and new ideas within a social context.
Phase 5: Integration of problems	Students propose coordinated actions to apply a solution, in order to follow a choice or decision.

Source: Yang et al., 2011.

Learning objects for DL courses should combine good educational design strategies with high quality content. This requires development teams that include teachers or subject matter experts, educational designers, and technology experts.

To ensure effective course development, it is important to establish a workflow that includes a content review process so that it is regularly updated and reflects new developments in the field in question. One highly recommended possibility is to integrate a variety of interesting sources available as open educational resources.

Ordinance n. 451, dated May 16th, 2018, defines as *open educational resources* those that are within public domain or have been registered under an open license allowing free access, use, adaptation and distribution by third parties.

Free educational resources are those that, despite being made available in the closed modalities of intellectual property, allow access without technical restrictions and without costs, for an unlimited time.

The Open Education Initiative Portal (Aberta, 2018, our translation)[3] presents a brief review of the literature on the reasons why it is recommended to adopt open educational resources, of which we highlight some:

- To facilitate the access of all people to knowledge;
- To ensure the freedom and creativity of production;
- To encourage collaboration, participation and sharing practices;
- To bring technology to the classroom in a productive and planned way, and which promotes the idea of authorship between teachers and students;
- To encourage educators and students to be recognized as authors;
- To allow access to education to those who are in school and to those who are not;
- To improve content that already exists and allow it to be appropriate and adapted to local realities;
- For quality education that is accessible and integrates different forms of individual learning;
- To encourage the production of local content;
- To encourage the sharing of learning resources among institutions, academics and within communities of practice;
- To enable teaching materials and other pedagogical resources to be universally improved and shared - locally, nationally and globally - to support learning;

  [...]
- To encourage the development, acceptance and adaptation of open technical tools and standards that have the potential to increase local productivity and use by teachers and students;

  [...]

The concept of quality in education is as complex as learning itself. There is a tension between the means to verify quality and expected results. The most common is that the perception of laypeople and the academic community is shaped by the legal framework and

3 IEA – Iniciativa Educação Aberta. Perguntas frequentes. Disponível em: <http://aberta.org.br/faq/>. Acesso em: 24 jul. 2018.

external supervision, either carried out by governmental agencies or not.

The forms of accountability and evaluation in education call for measures that are minimally comparable and trustworthy, as something that always walks on unstable ground, especially in the times of paradigmatic changes that society is undergoing.

It is necessary to ensure that the needs and expectations of the students are met, as well as the demands of the socioeconomic-environmental context in which they are inserted.

Reliable, academically recommended and updated content depends on well-prepared teachers, engaged in research, willing to dialogue with students, capable of going beyond what was originally proposed to open new avenues for each question or answer reached.

About the author

Luciano Sathler Rosa Guimarães is the dean of Centro Universitário Metodista Izabela Hendrix, Brazilian Association of Distance Learning (ABED) director, collaborator professor at the master's program at the Methodist University of São Paulo, and PhD in Management by Faculdade de Economia, Administração e Contabilidade da Universidade de São Paulo (FEA/USP).

Distance learning as a low-cost educational option

Vani Moreira Kenski and Victor Wolowski Kenski

In recent years, courses in distance learning (DL) have shown higher growth in enrollments than on-site courses. One of the explanations for this preference of the students is the lower price of the DL tuition. Data collected by Brazilian Association of Distance Learning (ABED) in the 2017 Census show significant differences between the prices of on-site courses and those of the DL, whether blended or full DL. This difference can be seen in Chart 2.13, presented in Part 2 of this Census.

The analysis of the data presented in Chart 2.13 shows that among the institutions that responded to the Census, the DL courses have prices, on average, 50% lower than those charged by on-site courses. According to the data presented by the Census, there is a higher incidence of full DL and blended courses among those with lower monthly fees. Among them, few have higher prices – starting at R$ 1,000 –, which leads us to identify DL as the most inexpensive educational option for students. Some factors can help us identify the causes that give rise to this situation.

Considering the price of tuition fees in the different modalities – on-site blended and DL, as shown in Chart 2.13 – and the institutional reality of their offer, one of the possible causes of their lower prices lies in the massive production of these courses. Offering the same classes – content and activities – on a large scale results in cheaper production and, consequently, the reduction of costs, which are reflected in lower tuition prices.

A second factor that leads to the possible lowering of tuition fees concerns the very process of competition between higher education institutions (HEIs) that already work in distance learning. In spite of licensing difficulties, these HEIs have expanded in recent times and present themselves as higher education options in the most diverse Brazilian spaces. Many competing institutions are present in medium and small cities, with hubs located in the same neighborhoods or in close quarters. In this situation, the dispute for the students of the region is intensified and reflects on the offer of courses with cheaper tuition. Even in big cities, the large number of DL courses offered generates differentiated processes of winning more students, through more attractive prices and other benefits.

Competition among HEIs tends to increase as some actions of MEC and the market begin to take effect. One of the main measures that will affect tuition fees in DL is due to the publication by the Ministry of Education of Normative Decree n. 11, of June 20 2017, which regulates Decree n. 9,057/2017. This measure, whose explicit objective is to accelerate the expansion of distance education, makes accreditation for DL easier for all HEIs, removing the requirement for previous on-site accreditation. It will reflect not only on the growth in the number of courses offered, but also on cheaper tuitions, caused by competition among institutions. But it is still early to see these changes. We can point out that, as a trend, these changes will be seen in the educational market in the coming years.

Another movement that refers to the cheapening of tuition fees in DL is related to the technological advances and access and use conditions for digital resources by the Brazilian population in recent years. Digital satellite technology, adopted in DL since its inception and in use until recently, was much more expensive, and these costs were included in the tuition. It was mainly the synchronous transmission of classes for students who needed to go the hubs in person to attend lectures. The expansion of the internet and broadband services reconfigured this model of distance learning, making it significantly cheaper. Significant aspects of this technological change are related to the use of mobile technologies and asynchronous virtual platforms, which changed the format of classes and the conditions for student access, participation and presence. The ubiquity characteristics of mobile technologies ensure that students participate and have continuous access to classes, that is, anytime, anywhere, through cell phones, tablets and notebooks.

The reality of the uses of mobile digital media is favored by the increase in the number of users. The

National Household Sample Survey (PNAD), conducted at the end of 2016, revealed that network access was present in most households in all major regions. The data also show that 99.6% of the Brazilian population aged 10 years or more accesses the internet via broadband, whether on landlines or mobile. Broadband access enables the differentiated production of educational actions in e-learning.

At first, all DL projects were technologically hybrid. In addition to the presence at the hubs and the availability of classes in virtual environments, HEIs produced learning materials on different media – printed and audiovisual – that were delivered to students for review and offline activities. This measure aimed to overcome the difficulties of many students in accessing the internet. With expanded access and increased speed, texts, movies, videos and animations are easily accessible by students on the Web.

Production costs also decreased with the industrialization of content production. Partnerships with virtual libraries, "content factories" and access to open educational resources at no cost to HEIs are also factors that directly result in lower costs and, consequently, lower tuitions.

Another reason that may explain the reduction in monthly payments is due to the financial crisis that Brazil has been going through since 2016. The low purchasing power of the population, coupled with the high level of unemployment, reduces the ability of students to pay for formal courses, either on-site or in DL. An immense mass of youths and adults at school age – especially in higher education – make up generation "neither-nor" (neither study nor work). In order to attract new students and retain those already enrolled, private HEIs need to reduce tuition prices and offer attractions for this contingent to remain or resume their studies.

New strategies are adopted by institutions to ensure greater financial balance. With reduced tuition fees, the policies of private HEIs are directed towards cost reduction in production and course offers. Thus, they increase asynchronous actions, the reuse of didactic resources and the use of self-instructional teaching strategies, as well as the relation between the number of students and the number of tutors, in addition to other measures that guarantee the attendance of large contingents of students with low investments.

The process of reducing the prices charged by Brazilian private HEIs seems to be a continuous movement in the coming years. By associating the legal facilities approved by Ministry of Education, which will promote the further expansion of DL, with the other aspects raised in this reflection, we conclude that the modality will have great growth in the near future, at a lower cost.

The most likely trend is that there will be a large number of enrollments in the various HEIs and that DL will acquire platform characteristics, that is, according to Parker et al. (2016, p. 11, own translation[1]) they will be differentiated as "a new business model that uses technology to connect people, organizations and resources in an interactive ecosystem in which incredible amounts of value can be created and exchanged". One feature of this model is that the more students, the lower the cost. The lower the cost, the more new students. This creates a self-sustaining process, which grows organically over time.

The investment of private HEIs in DL is perhaps the best example of a large sector that is ripe for the strategic revolution provided by the modality, since it has among its characteristics the main aspects identified by the theorists of this model: it is based on information; has limited controls for its expansion; is highly fragmented and tends to become even more so; and has great information asymmetry, which, in this case, is the very object of the business (Parker et al., 2016).

If these trends are confirmed, a realignment is expected in the structure of higher education in the country. Small on-site institutions will find it more difficult to be maintained unless they are involved in DL. They will be a part of the great mass of institutions that offer solutions for educating people at relatively low costs, more concerned with the incorporation and permanence of their students.

The increased competition will lead to lower tuition fees and, at the same time, conditions for the provision of better quality processes by HEIs that will be really concerned not only with costs but with

1 PARKER, G. G.; VAN ALSTYNE, M. W.; CHOUDARY, S. P. **Plataforma**: a revolução da estratégia. São Paulo: HSM, 2016.

the improvement of distance education and training. When the price factor is no longer a condition of differentiation between teaching offers, other relevant categories stand out, and one of them is quality. Institutions that offer quality education at a fair price can create an important differential in the future. In general, major rearrangements are foreseen in the values and structures of private HEIs, since this process, which has already begun, is totally disruptive.

About the authors

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Executive summary

The Brazilian Census for Distance Learning has a tradition of ten years measuring the development of distance learning (DL) in Brazil. Over the years, we have noted a very marked growth in this teaching and learning modality, as well as the consolidation of successful practices to take education to every corner of the country and to everyone who wishes to study in flexible locations and times.

Having become a reference to understand the practices of DL in the country, this Census has also become an extremely large and broad study. Therefore, we saw the need to produce it in a more flexible way, both to make the main survey shorter, as participants considered it too long, and to dynamically raise data as they became necessary. So, starting in 2018, the main survey of the Census involves questions related to the broad aspects of this modality, and the print version presents a synthesis of these results. Whenever possible and significant, we included a few historical analysis.

The online version of the Census presents a longer text, and all references obtained by the study, such as tables and charts, in addition to analyses made by Brazilian Association of Distance Learning (ABED) directors and information about suppliers. The issues related to DL practices will then be collected in specifics surveys released over the year, and the results will be dynamically published online. This change allows us to collect and publish the data more quickly over the year, include new and different topics of interest and keep the Census tradition.

The year 2017 was marked by another important change: the legislation change for the creation of DL institutions and hubs in the country. The numbers raised by the Census reveled how this change in the law warmed up the market. The number of respondents was the highest in the history of the Census: 351. We keep getting responses from institutions all over the country, but are already seeing a market concentration in the Southeast, especially São Paulo.

The Census also counted 14 DL institutions with less than one year of existence, which had not happened for a long time in this research. Regarding on-site support hubs, as predicted, their growth was extremely relevant: of the 11,008 hubs, 3,137 were created in 2017, and 30% of those were created in cities where their institutions were not yet present, and the rate of hubs in inland cities compared to state capitals increased from 65 to 78% of total hubs.

Along with this increased offer, the number of students in DL in some of its modalities (accredited full DL or blended courses and corporate or non-corporate open courses) has also increased significantly. We had a record number of students: 7,773,828. In 2012, we had the second highest number in the historical series: 5,722,466.

The courses which increased their number of students are those in higher education and sensu lato graduate courses. Sensu stricto graduate programs, which appeared only recently, did not show growth in the past few years, and DL in basic education also saw a decrease.

Dropout rates in distance learning are still higher than in on-site courses, but 5% of institutions have rates from 0 to 5%, 5% of institutions have rates from 6 to 10%, and only 1% of institutions showed rates of over 50%.

This year, for the first time, we included a question regarding the cost of the courses. It was formulated as follows: “How much did your institution charge monthly in 2017 for accredited full DL courses, or, in case your institution does not charge for education, what was the monthly cost of each student?”

Even with a relatively low response rate, as expected, it was possible to contrast that DL seems to be gaining terrain as a low-cost option in the country, compared to on-site courses. Of all institutions offering accredited full DL courses, 17% charge (or state that their students cost) from R$ 251 to R$ 500, and 5% charge less than R$ 100. The vast majority of courses costing more than R$ 500 are on-site, and 2% of the institutions offering accredited full DL courses charge (or cost) from R$ 1,000 to R$ 2,000 monthly, and 1% charges (or costs) more than R$ 2,000.

Table's list

Part 5 – The concept of quality in distance learning

Part 6 – Supplying institutions

Part 7 – Profile of students

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Chart's list

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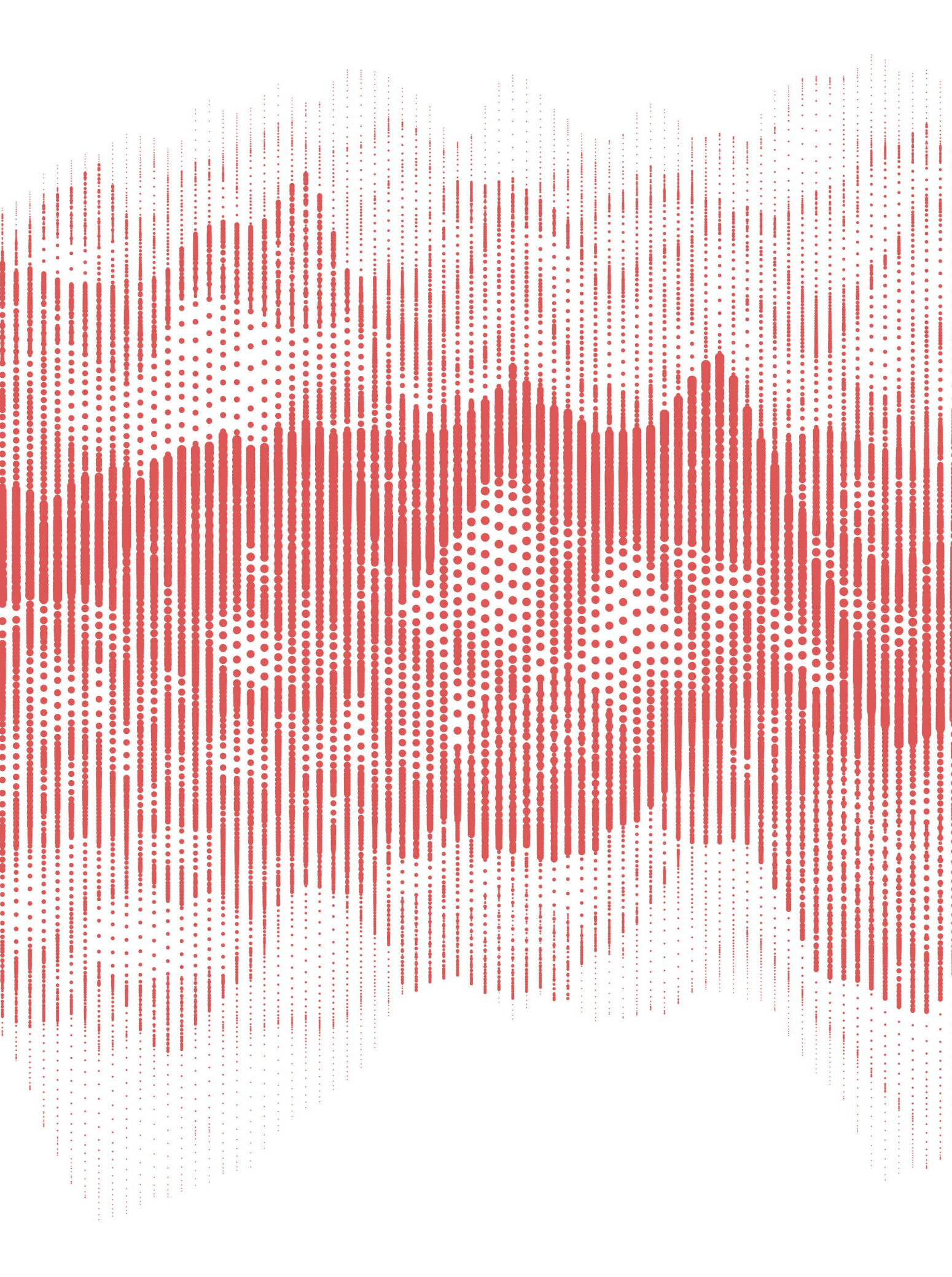
Part 1

Overview of the 2017 Brazilian Census for Distance Learning



1.1 Objective and scope

The Brazilian Census for Distance Learning, currently in its tenth edition, results of an effort to understand the scenario of distance learning (DL) in Brazil and map the main trends in this industry.

This Census aims to provide quantitative and qualitative information on the DL activities in Brazil to all concerned, covering all educational levels of the formal education system, informal teaching initiatives and activities of institutions that supply products and services in this industry.

Because institutions have chosen to participate voluntarily, the survey that feeds this document seeks to be comprehensive, but does not intend to establish an exhaustive map of DL in Brazil. Its analyses, instead, aim to present a picture of market trends in regards to the categories of institutions that operate in the DL modality, the types of courses offered, the audience they reach, the execution of DL activities and their organization.

Up until 2016, the Census would annually define a topic of interest to be explored in detail, in addition to the points regarding the scope of DL in our country. As the demand keeps growing for specific information regarding different practices of this educational modality, we chose to make this Census more dynamic. We will continue to raise information on the size and reach of DL in Brazil every year during the same period, from January to March. But specific topics will be handled in separate surveys, whenever a topic of interest is identified, and the release of the results will also be moved forward. With this, we hope to meet the market's demand for data and provide material to ground best practices in the DL field.

The topics we approached in this version are as follows:

- **Part 2 – Profile of educational institutions**: distribution by administrative category, location (by region and state, Federal District/state capitals or inland cities, same state as the headquarters or other states), years of operation, size, course modalities, participation in the Universidade Aberta do Brasil (UAB) and Universidade Aberta do Sistema Único de Saúde (UNA-SUS) and cost of the courses.
- **Part 3 – On-site support hubs**: number and location of hubs, rate of growth in 2017 and their function.
- **Part 4 – Offer of courses, number of enrollments and dropout rate**: number of courses and enrollments divided by academic level, knowledge area and administrative category, for the first time in the Census presented with historical series. This section includes data on dropout rates.
- **Part 5 – The concept of quality in distance learning**: analysis of results of the evaluation, in Likert scale[1], of the degree of association between the indicators presented and the concept of quality in DL.
- **Part 6 – Profile of supplying institutions**: location, size, services provided, level of interest with the Census and their view of what constitutes quality in DL.
- **Part 7 – Profile of students**: age group, gender, social class, high school attendance.
- **Part 8 – Educational resources available to students**: types of content and tutoring offered to DL students in Brazil.
- **Part 9 – State of business in distance learning**: evolution in the number of enrollments, profitability of courses, investments made and planned.
- **Part 10 – Acessibility survey results**: acessibility in DL report.

In this Census, you will find tables that present these data in a much more detailed way, explaining the degree of increase or decrease in investments, enrollments, profits and future investments.

1.1.1 Criteria for participation in the survey

Participation in the Brazilian Census for Distance Learning is not dependent on ABED membership, since the survey's main goal is to identify distance learning trends in Brazil, making no distinction between

1 Psychometric response scale described by Rensis Likert, commonly used in opinion surveys. Participants specify their level of agreement with a series of statements in varying degrees (1 to 4, where 1 means "strongly disagree" and 4 means "strongly agree"; or 1 to 5, where 1 means "strongly disagree" and 5 means "strongly agree"; or even 1 to 10, where 1 means "strongly disagree" and 10 means "strongly agree"). In this Census, we used 1 to 4 and 1 to 5 scales.

member and non-member institutions. Participants in the 2017 Census included:

- institutions accredited by the Brazilian National Education System – Ministry of Education in all levels: primary, technical, undergraduate and graduate.
- formal and informal educational institutions who offer open courses.
- institutions operating in corporate learning.

These institutions develop direct and indirect actions in DL, as detailed below.

- **Accredited full DL courses**: these are DL courses offered by institutions accredited or authorized by a federal, state or municipal regulatory body.
- **Blended courses**: given the recent inclusion of different ways to create on-site courses, it became necessary to understand how the market defines these courses. These may include the distance modality in on-site courses, as defined by federal law, or the on-site modality in distance courses, or even learning offers mediated by technology without altering the on-site workload. We kept the data on this type of accredited courses, and included a question about how institutions define them.
- **Non-corporate open DL courses**: these are DL courses that are not regulated by an educational body, are offered to the general public, and may or may not be linked to an institution.
- **Corporate open DL courses**: these are DL courses that are not regulated by an educational body, and are designed to cater to the training needs of employees or clients of an organization.

1.2 Invitation to institutions and participation rates

Participation in the Brazilian Census for Distance Learning is voluntary and depends on the collaboration of each institution surveyed. The Census is informed by the available sample, whose data establish the scope of the analysis.

1.2.1 Invitations sent

ABED contacted 1,303 institutions via email newsletter and an open invitation published on the association's website, with information on the survey for all establishments operating in DL. The selection of institutions contacted to compose the 2017 Census was informed by a survey of the entities working in the DL field based on the sources listed below.

Educational institutions

- List of educational institutions accredited by the Brazilian National Education Council (CNE) to offer DL courses at undergraduate and graduate levels.
- List of institutions accredited by State Education Councils (CEE) to offer DL courses at the basic, youth and adult education, and vocational levels.
- List of institutions cited in the Educational Census that offer DL courses.
- List of institutions partnered with federal projects of the Open University of Brazil (Universidade Aberta do Brasil – UAB), the E-TEC Network of Brazil and institutions partnered with the Unified Health System (UNA-SUS).

Corporate entities

- Companies with notorious projects in corporate DL.
- Companies cited in recent academic studies as being involved with the DL modality.
- Companies listed by the Ministry of Development, Industry and Foreign Trade (Ministério do Desenvolvimento, Indústria e Comércio Exterior – MDIC) as having projects in corporate learning.
- Companies recommended by professional associations, such as the Brazilian Association of Corporate Learning (Associação Brasileira de Educação Corporativa – AEC Brasil) and the Brazilian Association of Human Resources (Associação Brasileira de Recursos Humanos – ABRH).

1.2.2 Monitoring and completion of forms

Registrations were monitored daily, as well as the responses obtained, in order to avoid the duplicity of responses. Moreover, the responses that had questions or inconsistencies were addressed promptly.

All forms sent by institutions were analyzed prior to data processing for the coherence and consistency of information. In case of inconsistency, an email was sent to the respondent pointing out the specific issues detected and requesting the correction and resubmission of the form for a new verification.

1.3 Survey methodology

The methodology of the 2017 Brazilian Census for Distance Learning is similar to that used in previous editions regarding the study of the reach of DL.

1.3.1 Data raised for the print version of the 2017 Census

Similarly to previous years, the Census survey was created in Google Forms[2]. We kept the format of core questions exactly the same as in previous years, and respondents were invited to answer the same questions regarding full DL courses, blended courses (presenting the new definition of this modality), non-corporate and corporate open courses. We kept the questions referring to practices seen in on-site courses. The data raised in this last block serve as a means of comparison with DL, and are not the main focus of this Census.

In this common core on the reach of DL in the country, we included a few important questions given the historical moment of DL in terms of increased competition due to the ease of opening on-site hubs in large scale. Therefore, we included a question regarding the price charged for the course, or the cost per student, of the different types of courses, and a series of questions on the rate of hubs opened and closed and their role in DL. It was necessary, also, to divide the dropout percentage ranges in smaller degrees, of 5% each, until the range of 50%. In the 2016 Census, we observed that the 11-25% dropout range was too large for us to be able to understand this reality.

In addition to the core questions, for the print version we raised a series of data about the opinion of educational institutions on quality in DL. In 2015 and 2016, we had raised data on the challenges of DL, and considered that it would be a good time to seek information regarding other qualitative points.

1.3.2 Data analysis

The data have been quantitatively and qualitatively organized into tables and charts for easy identification of DL market trends and practices in Brazil.

Whenever significant, we grouped the responses to a given question by administrative category and modality of the courses offered. With these comparisons, we can identify the behaviors and trends that are typical of public, private or S System institutions, for example, or identify more common practices in full DL or open corporate courses.

In the 2017 edition, we raised historical data based on previous Censi, whenever the methodology of each edition allowed for a comparison of the data. It was possible to arrange a historical series of the number of enrollments by modality since 2009 and by educational level since 2012. As for the offer of courses, we included a historical series since 2014.

Just like in 2015 and 2016, we held a series of questions about on-site learning, in case DL institutions also offered this modality. These responses often guided the analysis, and allowed to established significant comparisons that distinguished and highlighted typical DL practices.

When numbers indicated any peculiarities in response patterns, such as an irregular trend or a peak in responses that deviated from the average, we performed a more detailed cross-check analysis of the data for a deeper understanding of such facts.

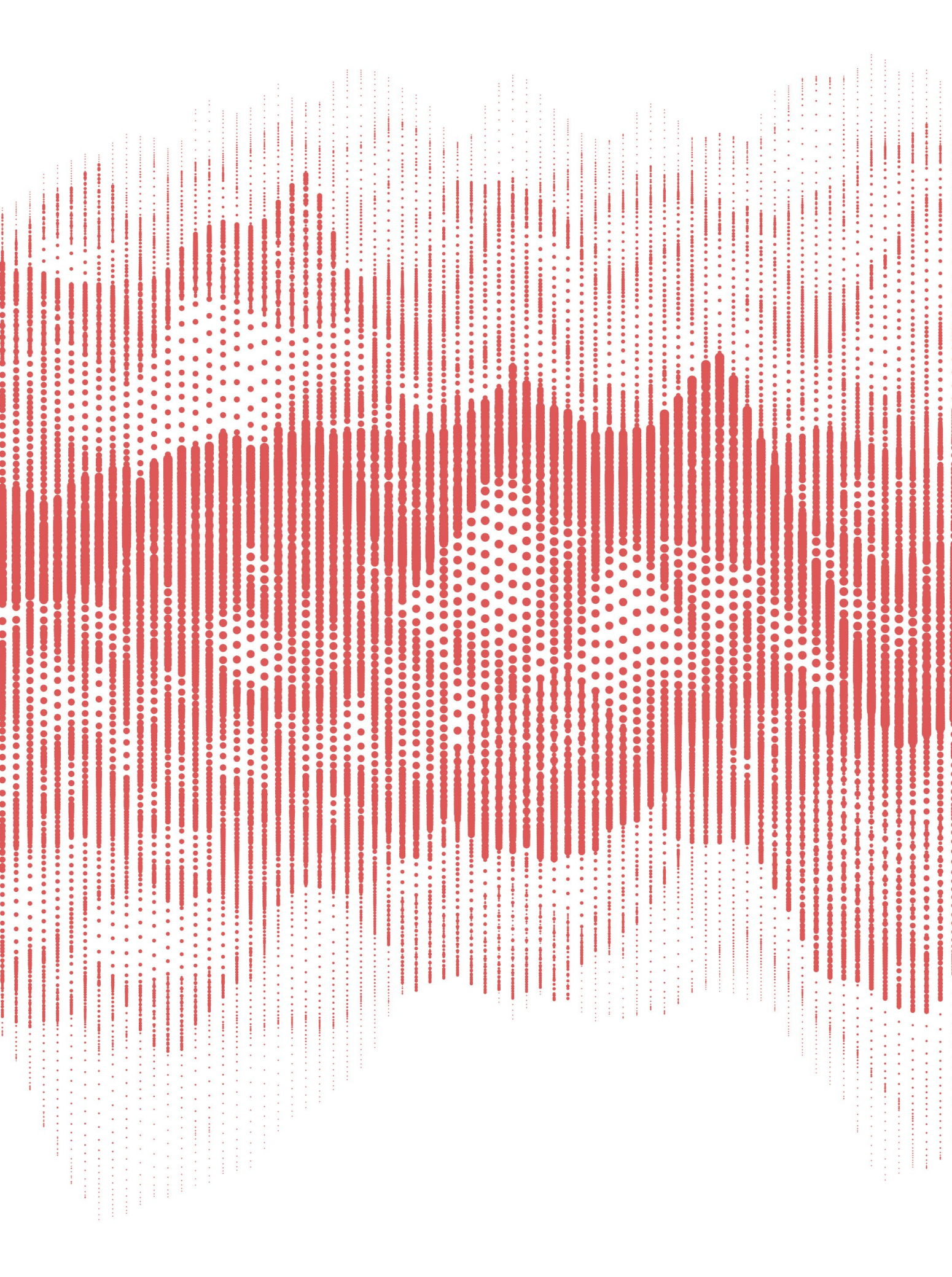
2 A tool for creating and applying survey forms, available for free with a Google account.

1.4 Commitment to participant privacy

An agreement was signed with all participants regarding our commitment to keep the identity of each participating institution confidential. Participants identified themselves, but no results may be specifically associated to any institution participating in the 2017/2018 Brazilian Census for Distance Learning.

Part 2

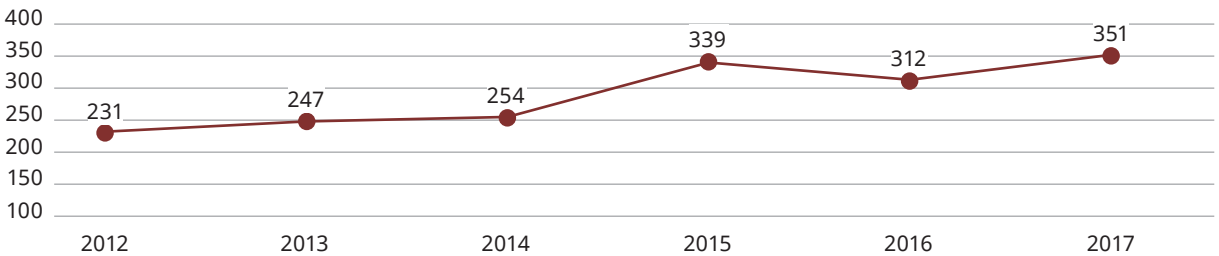
Profile of educational institutions and costs of courses



The big landmark of 2017 for distance learning (DL) were more flexible laws for accredited DL courses, with the issuance of Resolution n. 11 of June 21st 2017. This allowed for the creation of institutions that offer DL without any on-site activities, and the creation of hubs was made easier as they became non-obligatory in accredited courses. This change certainly impacted the offer of courses in the different modalities. In this analysis of the 2017 Census, we will see the data referring to the increase in number of courses, taking into account the recent change in the law.

The 2017 Census reported an increased in number of respondents: 351 educational institutions contributed with data for this study. As we received the responsed of 10 institutions after the deadline, they could not be computed into the more specific analyses. Therefore, we considered the total of institutions as 341 for the percentage analyses and calculations of this Census.

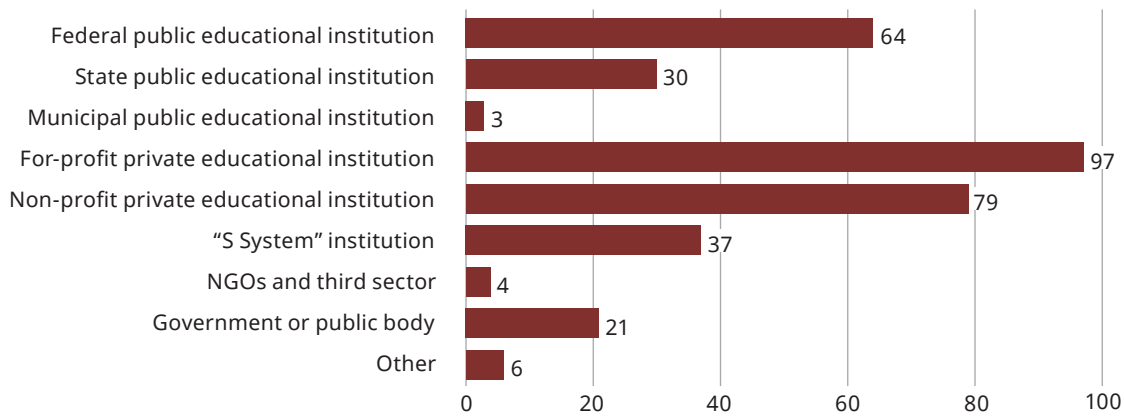
Chart 2.1 – Number of educational institutions participating in the 2017 Census



2.1 Distribution of the sample by administrative category

The distribution of respondents by administrative category is presented below. The categories with the most participants are for-profit private institutions (97), non-profit private institutions (79) and federal public institutions (64). These institutions correspond to the most active in DL in Brazil.

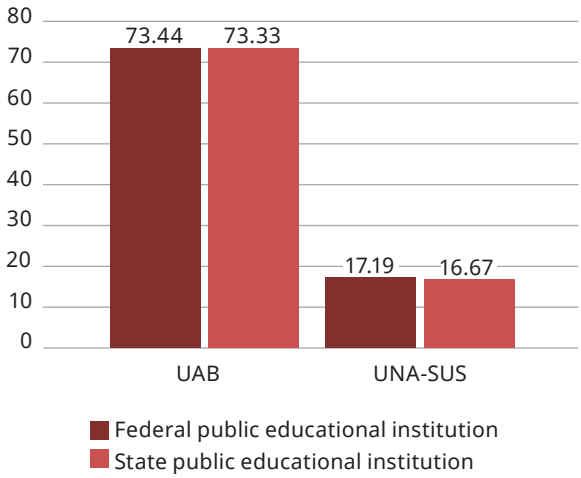
Chart 2.2 – Number of participating institutions, by administrative category



2.1.1 Participation in UAB and UNA-SUS

Among the public institutions participating in the 2017 Census that are eligible for the UAB and UNA-SUS programs, we see approximately 73% of federal and state public institutions in UAB and 17% in UNA-SUS.

Chart 2.3 – Percentage of participation of public institutions in UAB and UNA-SUS



2.2 Geographic distribution of respondents

Like in previous years, the respondents of the 2017 Census come from every region and every state of the country, as revealed by the following charts. However, we can already observe a concentration of institutions headquartered in the Southeast, increasing in presence from 37% to 42%, while their presence in the South and North regions decreased in proportion. This concentration is especially visible in the state of São Paulo, with 67 participating institutions in 2017 versus 58 in 2016.

Chart 2.4 – Evolution of the percentage of educational institutions, by region

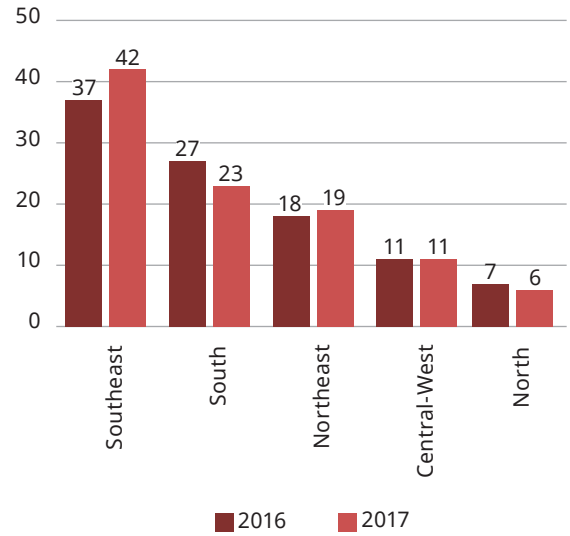
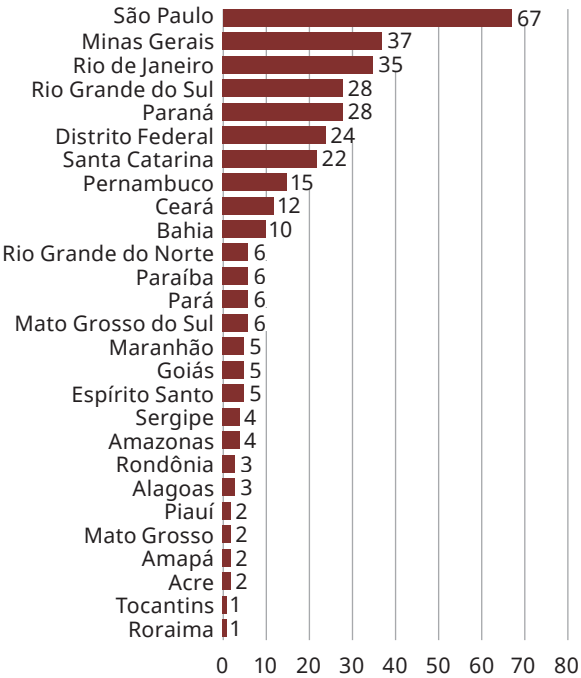
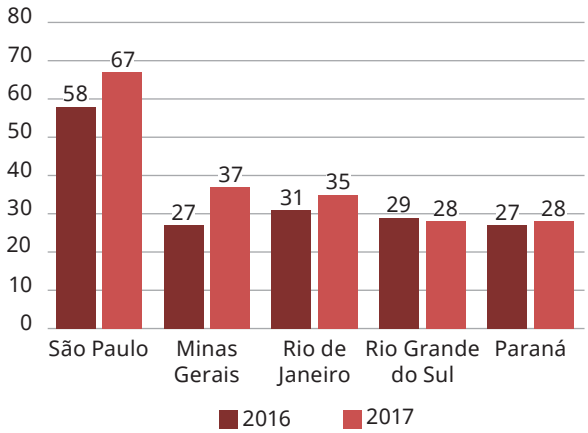


Chart 2.5 – Number of educational institutions, by state



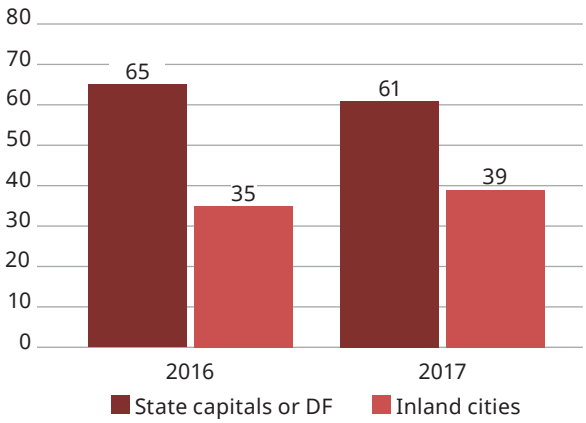
Among the states with the highest percentage of institutions participating in the 2017 Census, we see an increased participation by São Paulo, Minas Gerais and Rio de Janeiro from 2016 to 2017.

Chart 2.6 – Evolution of the percentage of respondents from the states with the most participants



The market concentration observed in the Southeast was not the same in terms of state capitals or DF. From 2016 to 2017, we saw an increased presence of institutions headquartered in inland cities.

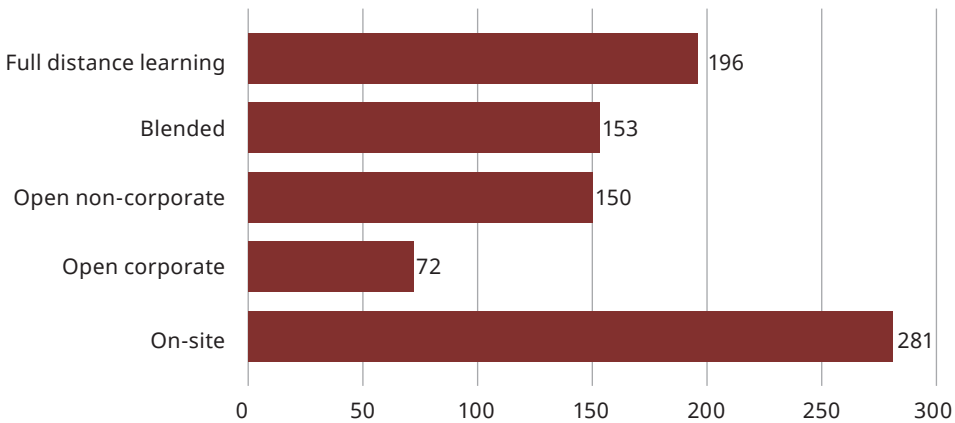
Chart 2.7 – Percentage of headquarters of institutions, by state capitals or DF and inland cities



2.3 Types of courses offered

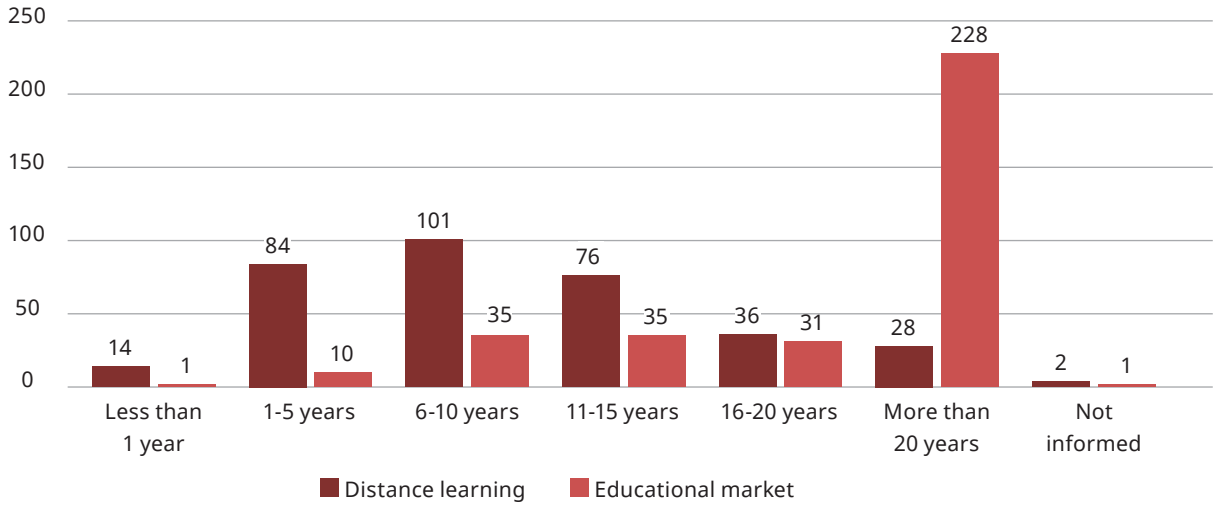
As for the modalities offered, most institutions (281) offer on-site courses. In terms of DL, 196 institutions offer accredited full DL courses, 153 offer blended courses, 150 offer non-corporate open courses and 72 offer corporate open courses.

Chart 2.8 – Number of courses offered by educational institutions, by type of course



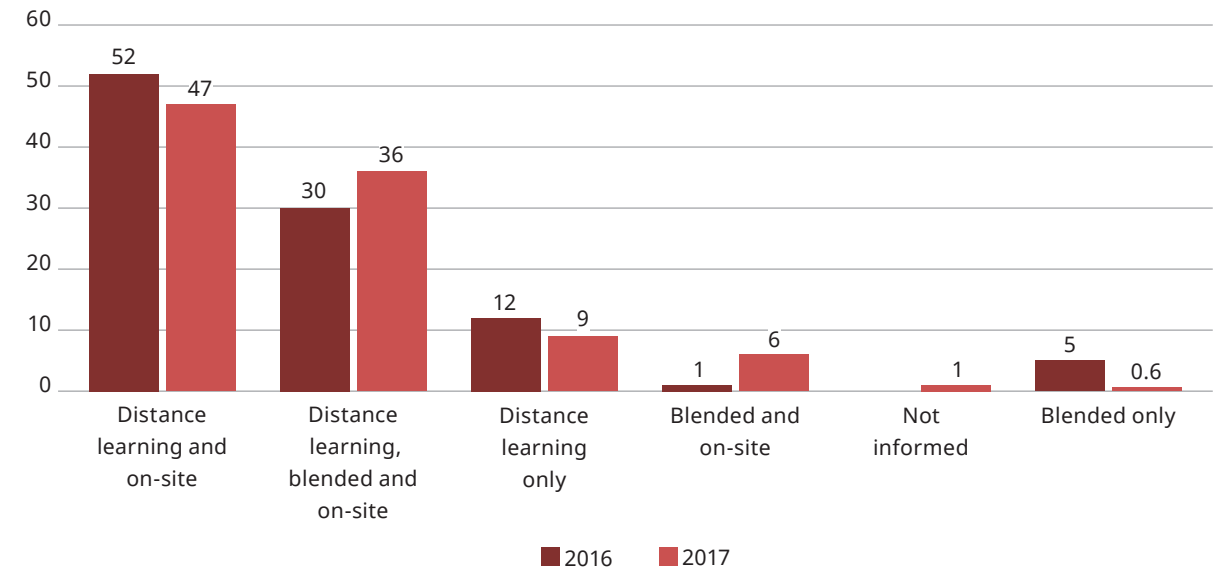
When we analyze the years of operation of institutions offering on-site and distance courses, it is clear that DL in Brazil had its origins in institutions that already offered on-site courses, and most DL courses were created six to ten years ago. However, a new momentum recorded by the 2017 Census is noteworthy. In 2015 and 2016, we had not seen the creation of institutions that started offering DL that year. In 2017, we counted 14 institutions that had been offering DL for less than a year. This momentum is probably related to the more flexible laws for DL in the country.

Chart 2.9 – Number of institutions by years of operation in DL and the educational market



In general, institutions offer more than one type of course, and the combination of distance and on-site learning is the most common, with 47% of institutions offering this combination, followed by institutions offering distance, blended and on-site courses. We observed that 9% of institutions offer only DL courses, which didn't exist in 2016. We are seeing an increase in the percentage of institutions that offer different modalities, and a reduction in those that offer only one modality, which shows that diversifying the offer may be the current trend.

Chart 2.10 – Evolution of the number of courses offered by the same institution, by type of course

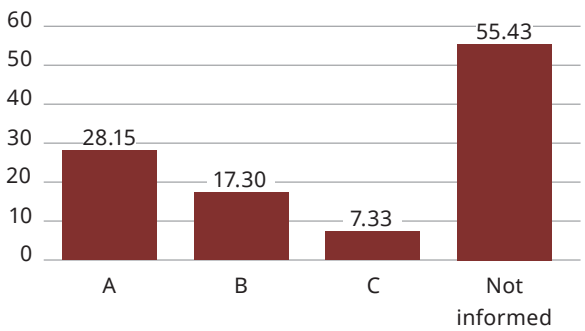


2.3.1 The meaning of blended course

Up until 2016, the Census considered blended courses as those defined by Decree n. 5622 (Brasil, 2005), which determined that on-site courses could offer up to 20% of their workload in the DL modality. The results of recent Censi started to show that institutions did not see the blended modality only according to this legal definition. So, we asked what a blended course meant for educational institutions, and we counted the responses from every participant. Therefore, starting in 2017, the Census is raising data from institutions that understand blended courses as:

a) accredited courses, originally on-site, with up to 20% of their official workload given at a distance (28% of institutions understand that this is the definition of blended);
b) accredited courses, originally DL, with some of their workload required on-site (17% of institutions understand that this is the definition of blended);
c) accredited on-site courses that incorporate technology into their teaching practices, with no official change in the workload, for example, on-site courses that incorporate blended learning, inverted classroom or adaptive learning, among others (7% of institutions understand that this is the definition of blended).

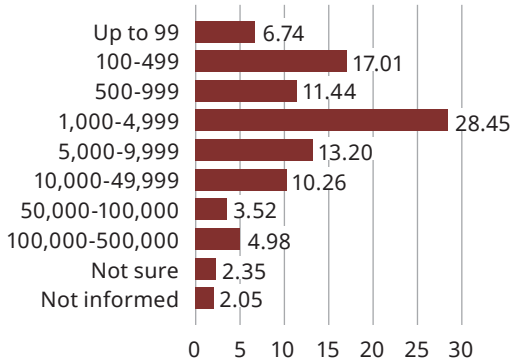
Chart 2.11 – Percentage of institutions that attribute different meanings to blended courses



2.4 Size of institutions

Institutions that participated in the 2017 Census have very different sizes in terms of number of students. The majority (28.45%) has 1,000 to 4,999 students, but it is worth noting that Brazil also has 4.98% of institutions serving over 100,000 students.

Chart 2.12 – Percentage of institutions per range of number of students



2.5 Cost of courses

The 2017 Census included, for the first time, a question regarding the costs of the courses. It was formulated as follows: "How much did your institution charge monthly in 2017 for accredited full DL courses, or, in case your institution does not charge for education, what was the monthly cost of each student?"

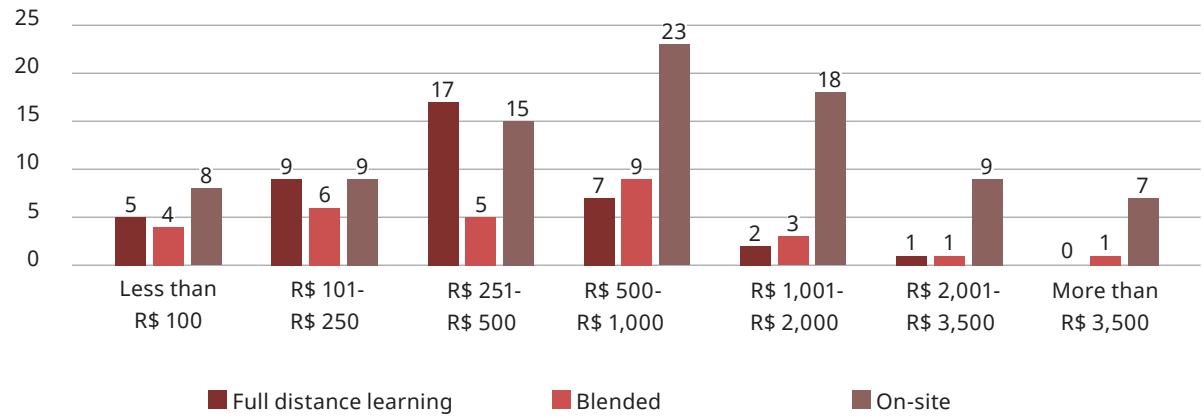
The answers still reveal a certain resistance in disclosing this information, but it was also possible to reach some interesting conclusions.

Table 2.1 – Percentage of institutions that did not declare the cost of their courses

	Full DL	Blended	On-site	Non-corporate	Corporate
Not informed	63.56	74.53	41.64	65.92	84.23

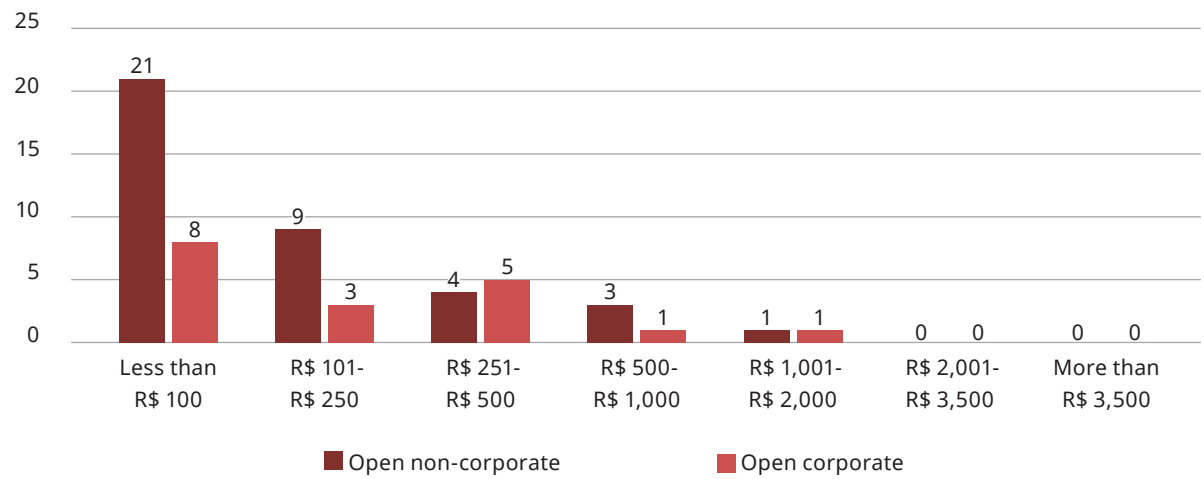
There was more resistance in informing data regarding DL costs than on-site courses. Still, the percentage of institutions that charge more than R$ 500 a month is much higher among on-site courses (23%) than full DL (7%) and blended courses (9%). Among the ranges above R$ 500, blended courses always show a higher response rate than full DL. Under R$ 500, full DL courses are more frequent than blended courses. Courses that cost more than R$ 1,000 are very frequent among on-site courses (9 to 18%) and only 1 to 3% of full DL and blended courses fall into this range. There are blended (1%) and on-site (3%) courses that charge more than R$ 3,500, but there are no full DL courses in this range.

Chart 2.13 – Percentage of institutions by range of average monthly cost of full DL, blended and on-site courses



Among open courses, 1 to 3% of institutions charge more than R$ 500 a month for their courses. Most open courses (21%) are in the range of under R$ 100 a month, and some corporate courses (5%) are in the range of R$ 251 to R$ 500.

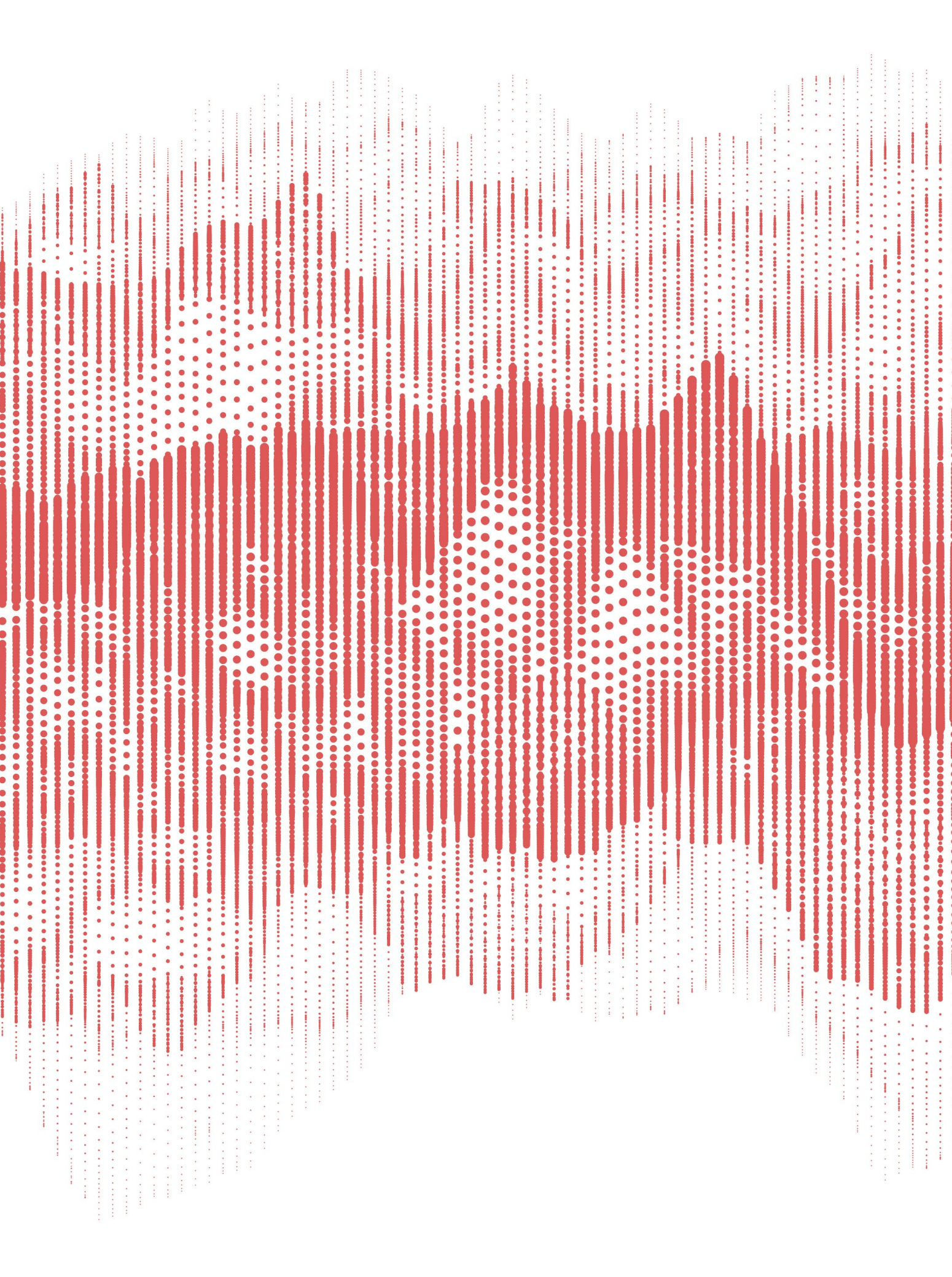
Chart 2.14 – Percentage of institutions by range of average monthly cost of non-corporate and corporate open courses



The average price charged by the courses is presented in tables in the online version of the 2017 Census, divided by administrative category. We did not present data from municipal public educational institutions and NGOs because we had few respondents from these categories, which would allow for the origin of the information to be identified.

Part 3

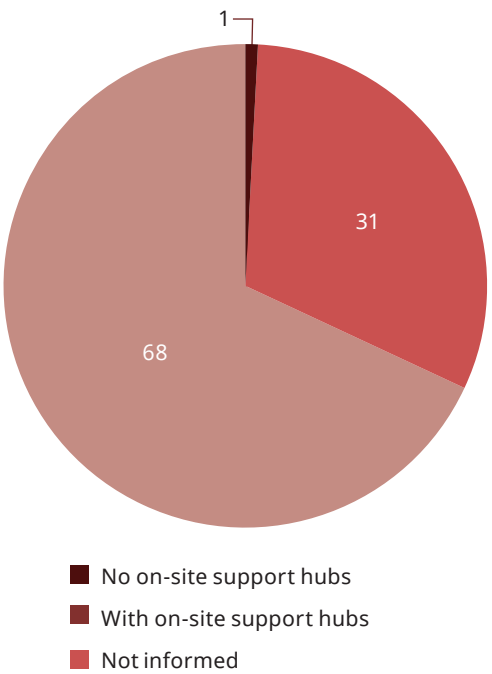
On-site support hubs



Distance learning (DL) in Brazil, at least the accredited courses, is established on the model of offering distance courses with on-site support hubs. With the new 2017 regulation, the offer of on-site support hubs is no longer a requirement. At the same time, institutions that are already accredited can further grow their offer of hubs without the need for in loco approval by the Ministry of Education.

These more flexible laws had the potential to create both a reduction and an increase in the proportion of institutions that have hubs. What indeed happened was an increase, revealing that the offer of hubs is also part of the strategy preferred by educational institutions. The ones that have hubs increased from 65% in 2016 to 68% in 2017 (these data were calculated based on a total of 351 respondents).

Chart 3.1 – Percentage of institutions with on-site support hubs



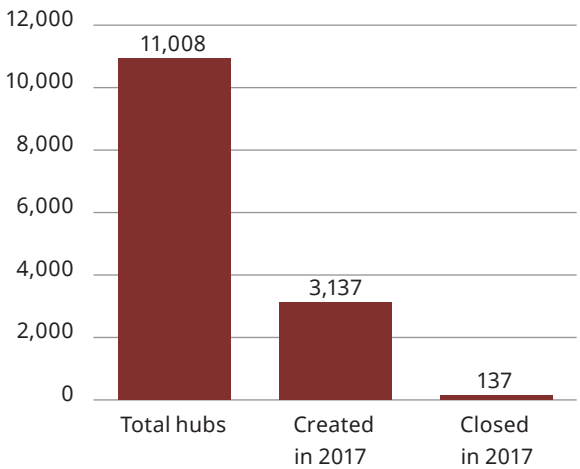
3.1 Detail of hub creation in 2017

The presence, creation, closure and distribution of on-site support hubs for DL in 2017 are extremely important information to understand how the market reacted to the new rules for opening hubs. Below, we present the detail on the number of hubs created and closed, where this happens and with what purpose.

3.1.1 Number of hubs created in 2017

Of the total 11,008 hubs that the the 2017 Census reported, 3,137 were created in 2017 and only 137 were closed (these data were calculated based on a total of 351 respondents).

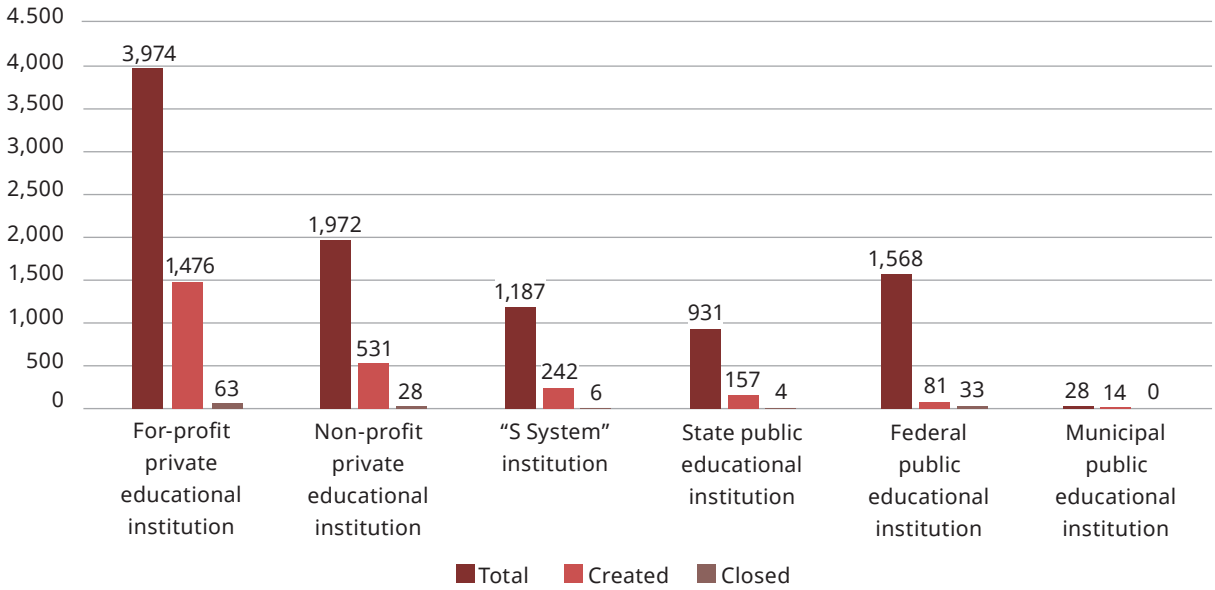
Chart 3.2 – Number of on-site support hubs created and closed



3.1.2 Creation of hubs by administrative category

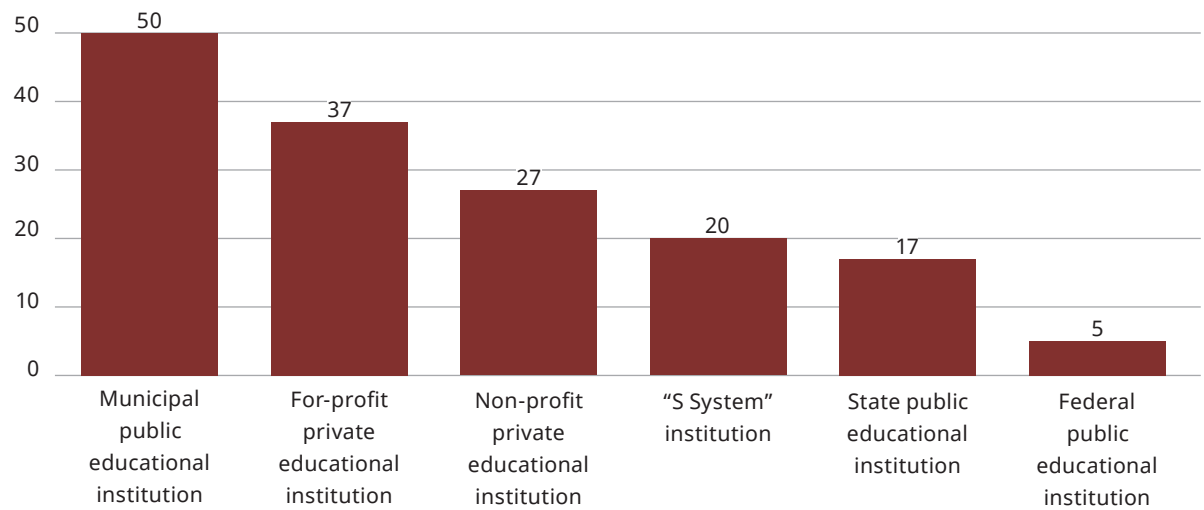
This momentum of accelerated creation of hubs happened mainly in for-profit and non-profit private institutions, with 1,476 hubs created in 2017 in for-profit institutions and 531 in non-profits. From this section onwards, we analyze the data based on the 341 institutions that responded to the Census within the deadline.

Chart 3.3 – Number of on-site support hubs created and closed, by administrative category



However, if we look at the proportional increase in hubs, we see that municipal public institutions created 50% of their total number of hubs in 2017, whereas 37% of hubs of for-profit private institutions and 27% of hubs of non-profit private institutions were created just this year. The S System created 20% of their hubs in 2017, and state public institutions, 17%. Only federal public institutions had a relatively low increase of 5%. The expansion in the number of hubs, therefore, had a never before seen acceleration in practically all administrative categories.

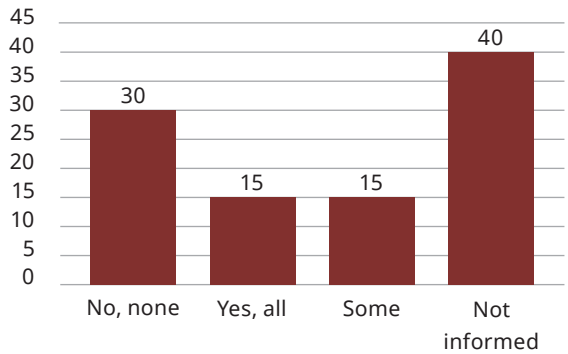
Chart 3.4 – Percentage of hubs created in 2017, compared to the total, by administrative category



3.1.3 Location of hubs created

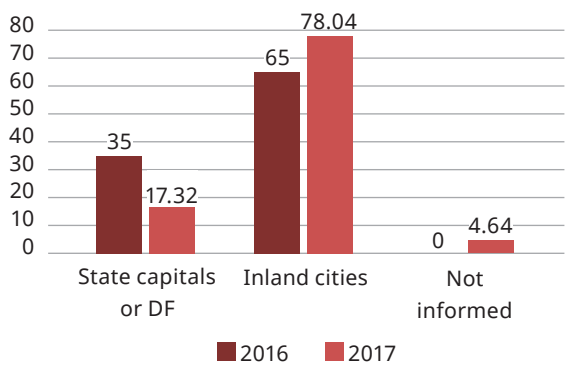
The 2017 Census investigated whether the hubs were created in cities where the institutions were already active, to strengthen their presence where they were already known, or created in other cities. The majority (30% of respondents) opted to create hubs in other cities. Another 15% strengthened their presence in their own cities, and 15% created hubs both in theirs and other cities. This movement of hub creation, therefore, represented a very strong geographical expansion.

Chart 3.5 – Percentage of responses to the question "Were hubs created in cities where the institutions is already present?"



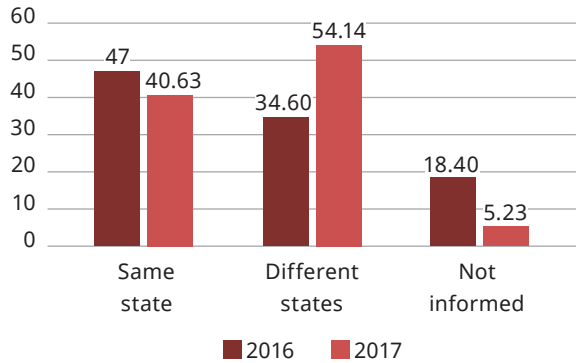
In terms of hub location, we also noticed a strong trend to move towards the states' inland cities. In 2016, 65% of hubs were located in inland cities. This rate reached 78% in 2017.

Chart 3.6 – Evolution of the percentage of hubs located in state capitals or DF and inland cities



The more flexible rules for creating hubs also made possible to expand beyond the state where the educational institution is headquartered. In 2016, 35% of hubs were located in states other than the institution's headquarters. In 2017, this rate reached 54%. This is a very significant change in profile for just one year.

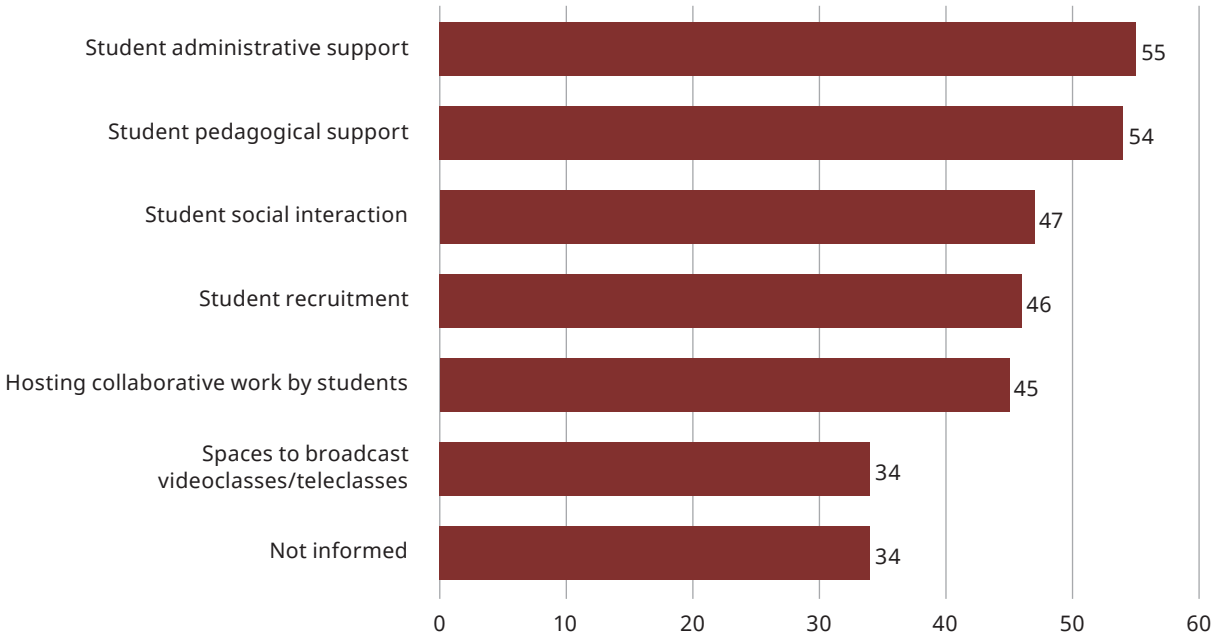
Chart 3.7 – Evolution of the percentage of hubs located in the same state of the headquarters or different states



3.2 The role of hubs in 2017

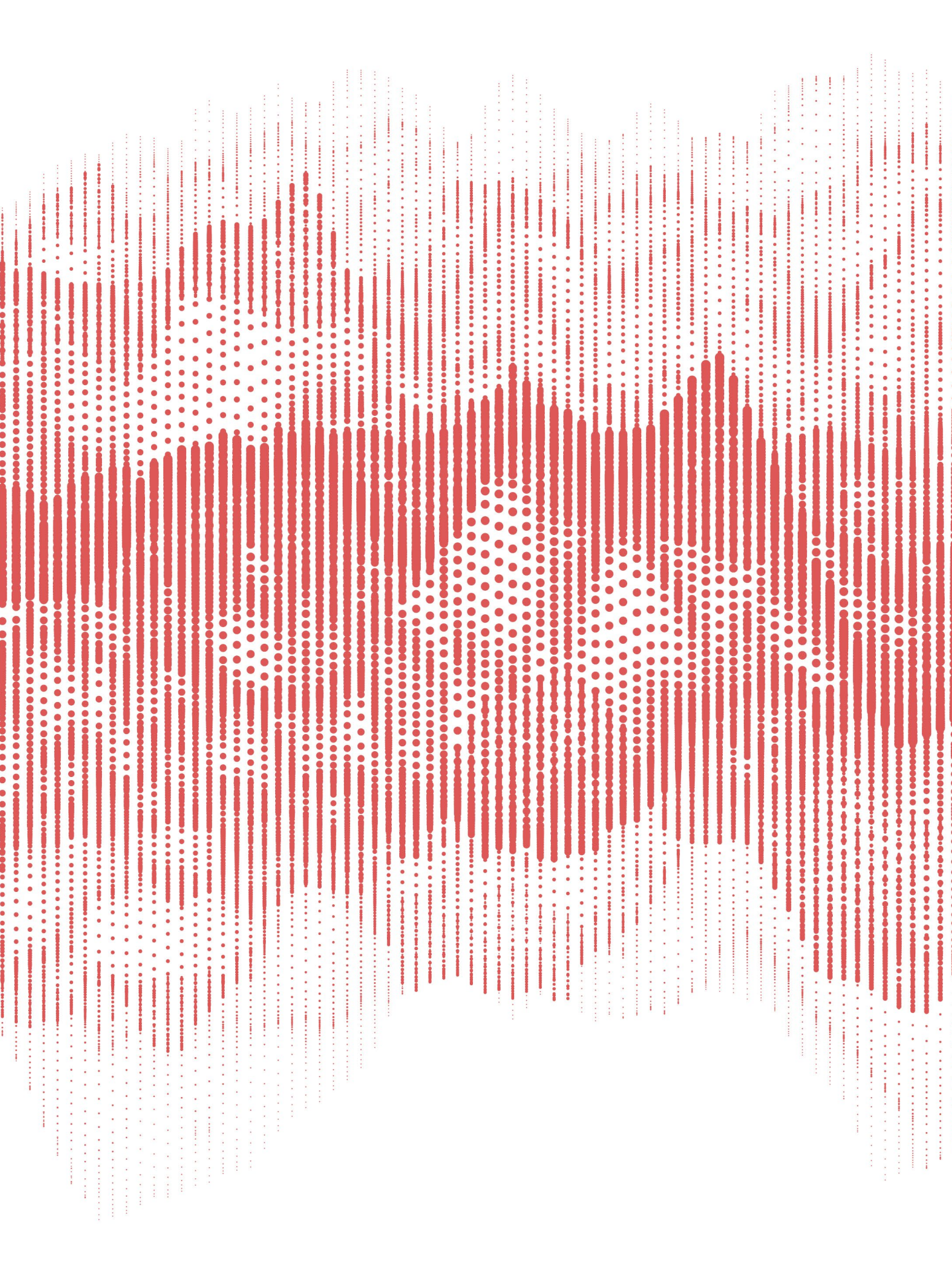
With hubs no longer being a requirement, and the activities that they carry out no longer being strictly defined, we felt it necessary to include a question about the activities carried out in the hubs. We observed that 55% of institutions offer administrative support to the student in these spaces, and 54% offer pedagogical support. These spaces are also used by 47% of institutions for social interaction among students, by 46% for recruitment, and by 45% for hosting collaborative work by students. Of all institutions, 34% state they dedicate these spaces to broadcast videoclasses and teleclasses. Therefore, it is clear that hubs join administrative, recruitment and pedagogical activities approximately in the same proportion.

Chart 3.8 – Activities carried out in hubs, in percentage of institutions



Part 4

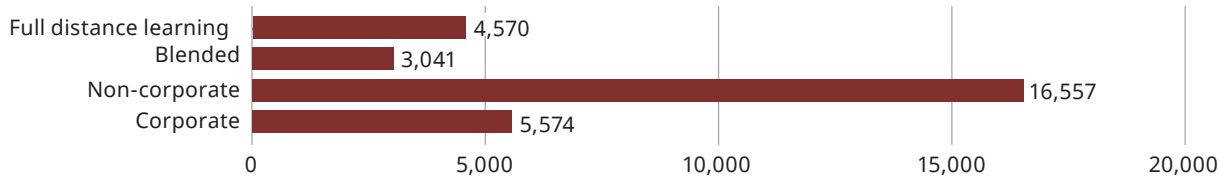
Offer of courses, number of enrollments and dropout rate



4.1 Offer of distance learning courses

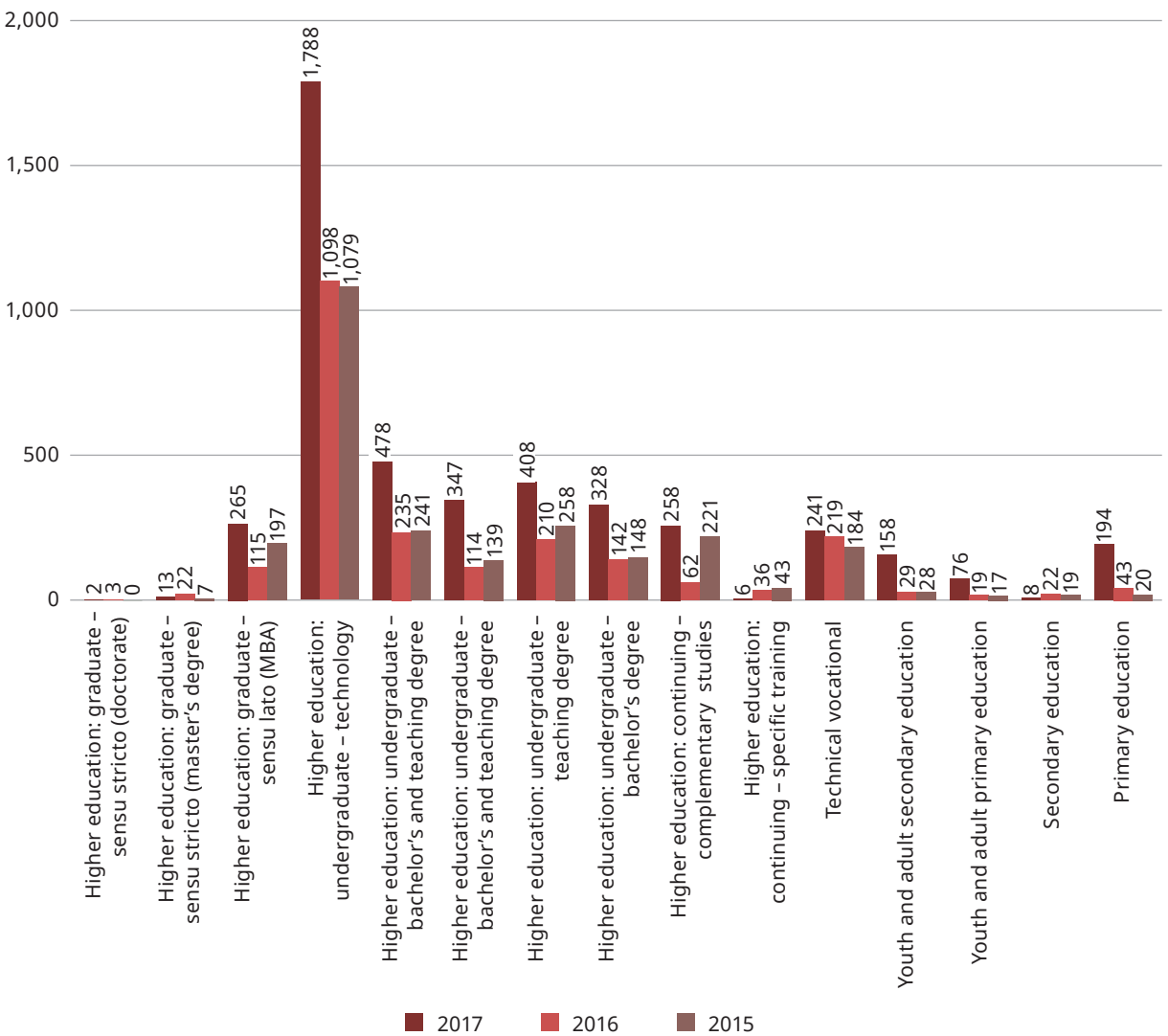
The number of distance learning (DL) courses in the country is very high, revealing a very diverse offer.

Chart 4.1 – Number of DL courses offered in Brazil



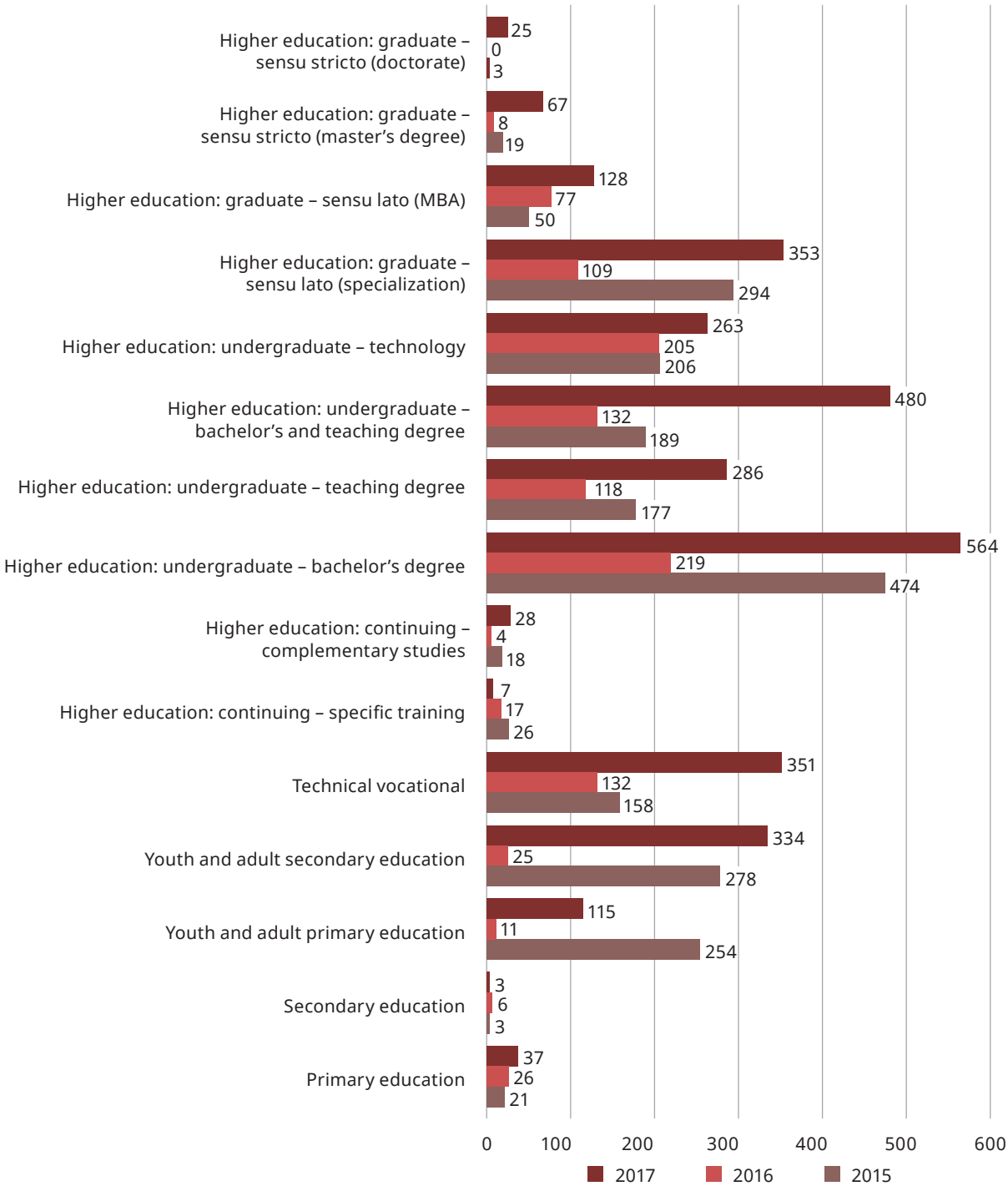
There was a significant increase in the offer of full DL courses, especially in sensu lato graduate courses and in technology higher education courses.

Chart 4.2 – Number of accredited full DL courses, by academic level



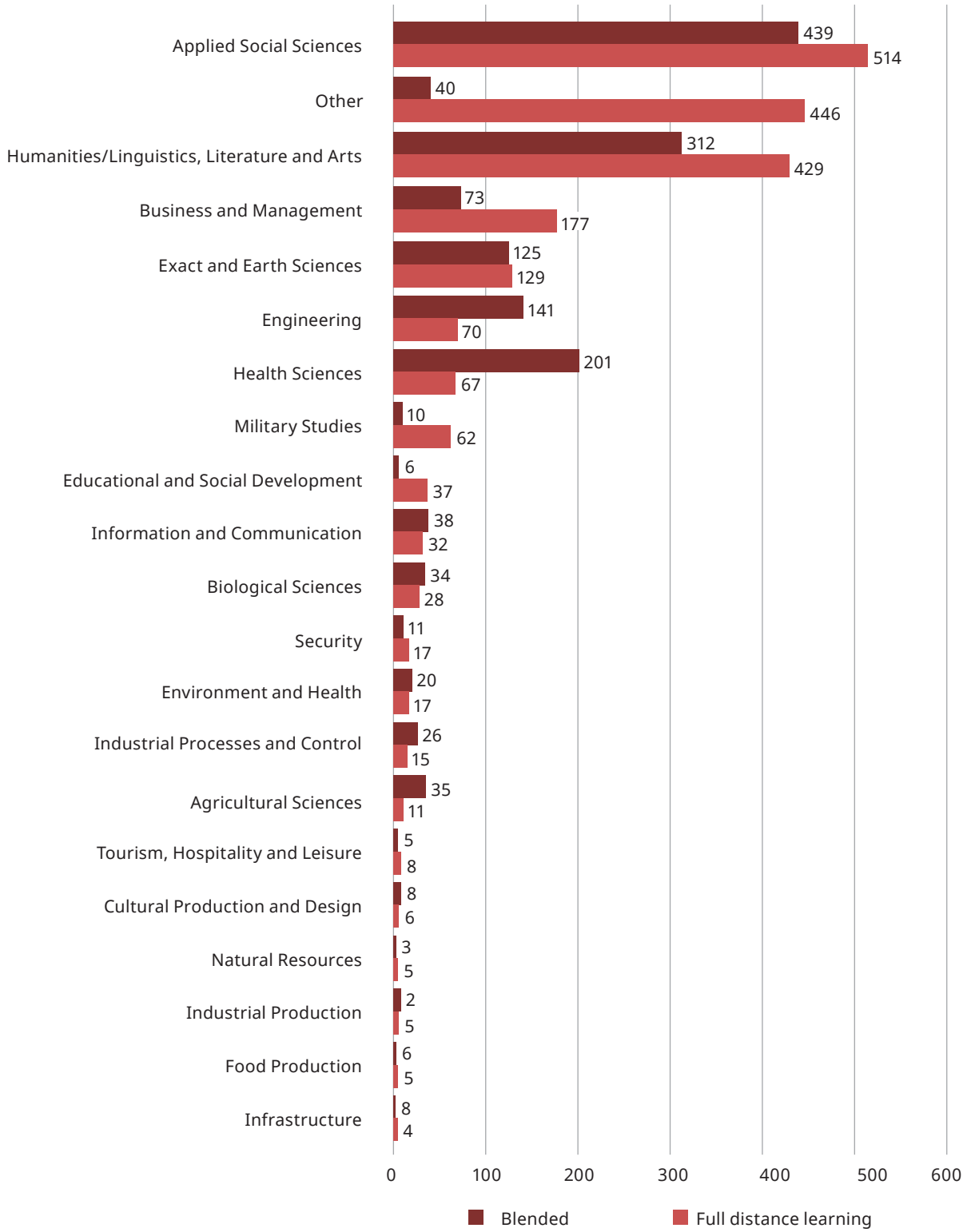
Among blended courses, the new trend of 2017 seems to be the offer of this type of courses for teaching degrees, which has never been a common practice. For bachelor degrees, this offer is starting to see a comeback.

Chart 4.3 – Number of accredited blended courses, by academic level



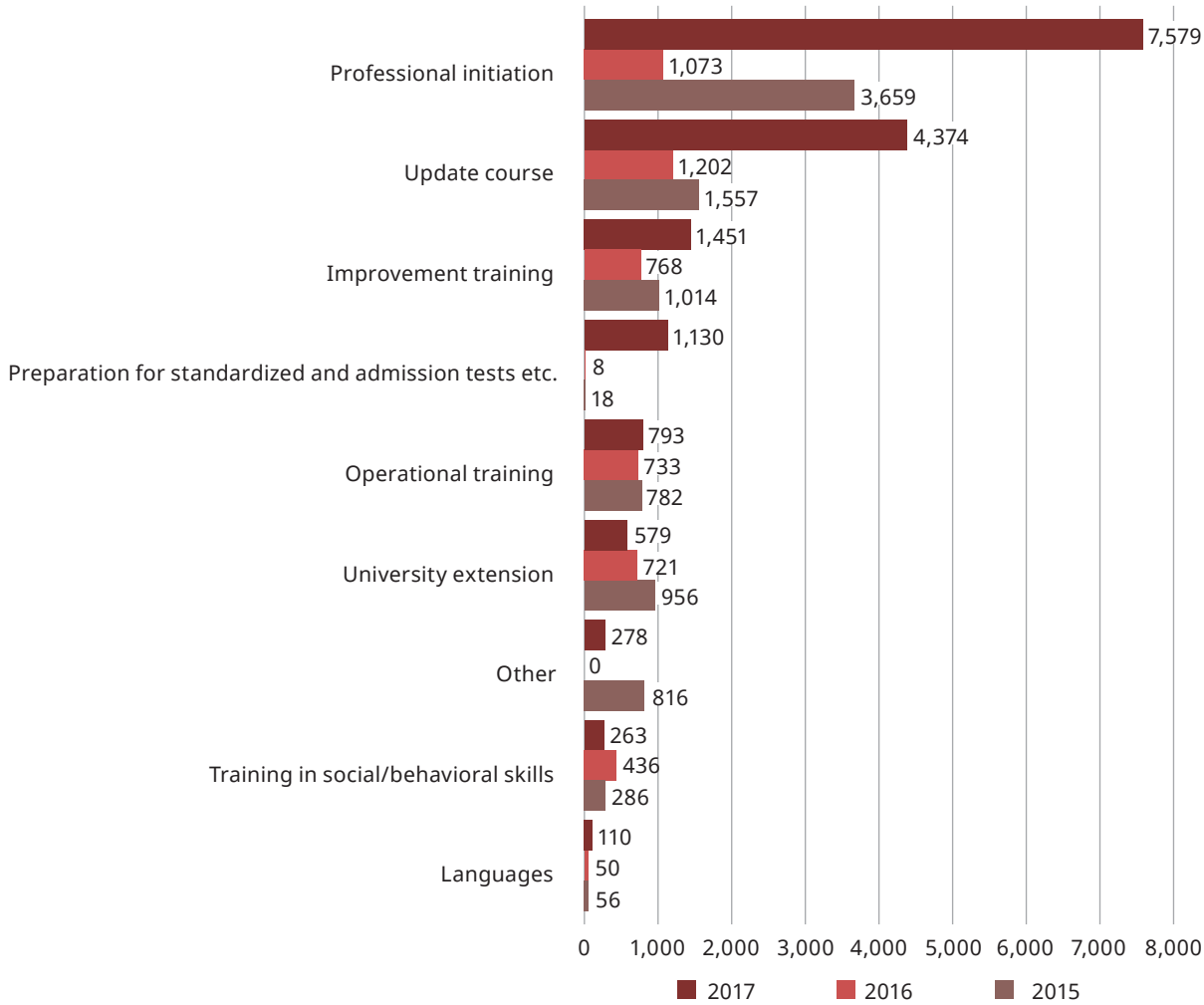
The fields that offer the most accredited courses are Applied Social Sciences, "other" and Humanities/Linguistics, Literature and Arts. We highlight the 201 courses in Health Sciences offered in the blended modality in 2017.

Chart 4.4 – Number of accredited courses, by knowledge area



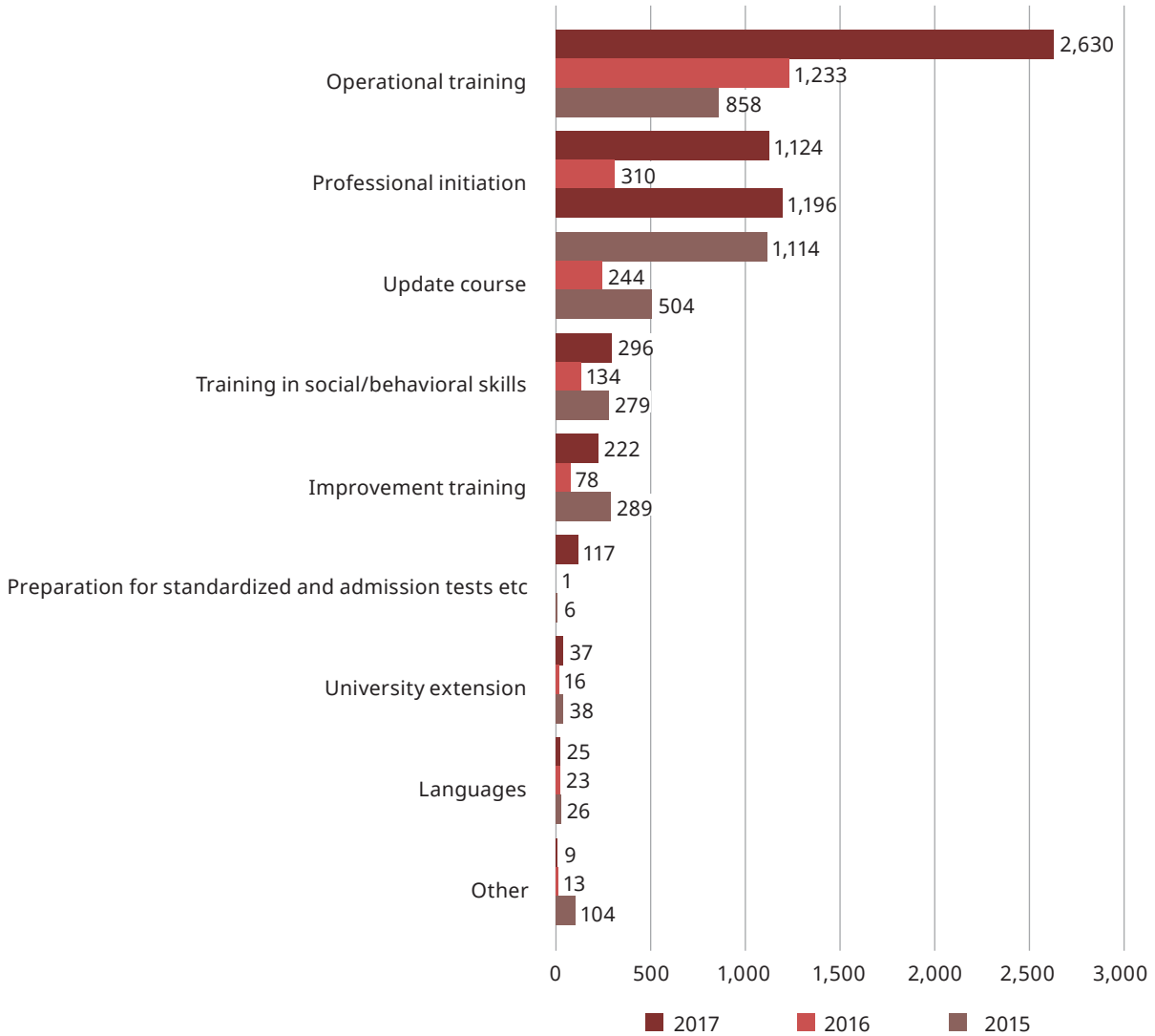
Among open courses, the increased offer was concentrated in professional initiation and update courses, with 7,579 and 4,374 offers of this kind, respectively. There is also a broader offer of DL preparatory courses for standardized tests, concentrated in for-profit private institutions.

Chart 4.5 – Evolution of the number of non-corporate open courses



Among corporate courses, the increased offer happened in operational training, professional initiation and update courses.

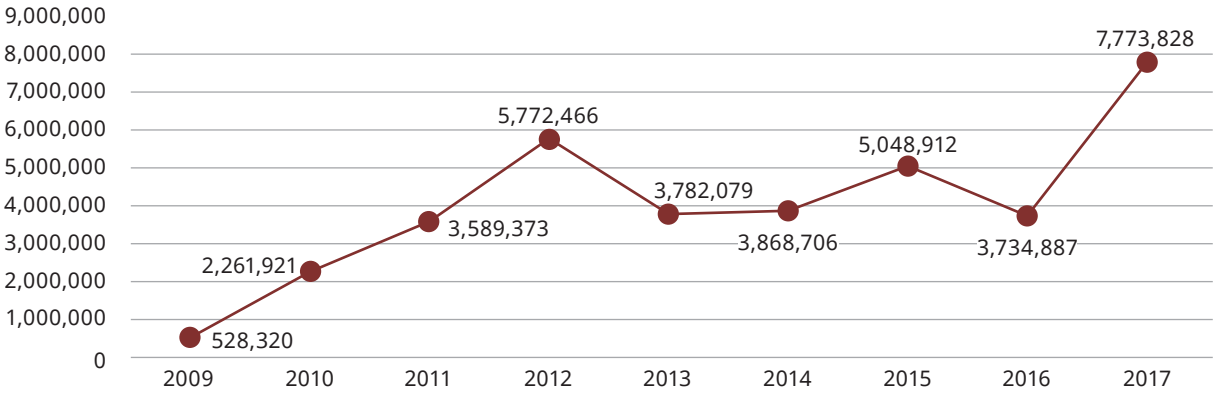
Chart 4.6 – Evolution of the number of corporate open courses



4.2 Number of distance learning enrollments

The total of enrollments, along with the increase in hubs and the broader definition of blended courses, also presented a very significant growth in the 2017 Census. We reached 7,738,827 students recorded in the Census, which is held by voluntary participation (these data were calculated based on a total of 351 respondents). Below, we present the historical series with the total number of enrollments recorded by this Census since 2009.

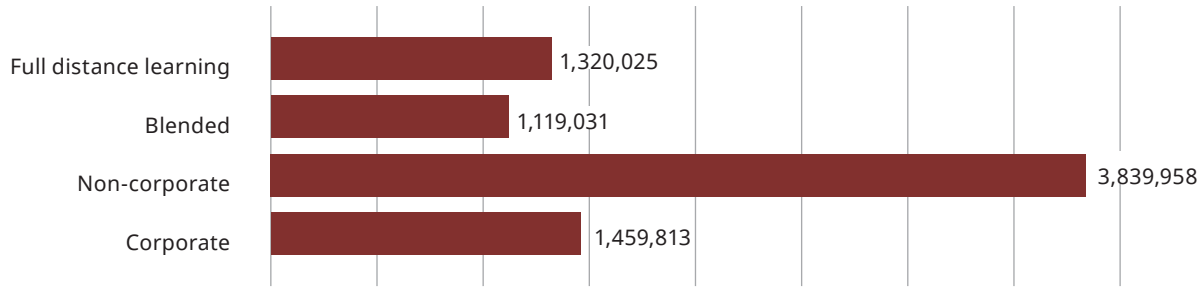
Chart 4.7 – Evolution of the total enrollments recorded by the Census



4.2.1 Enrollments by type of course

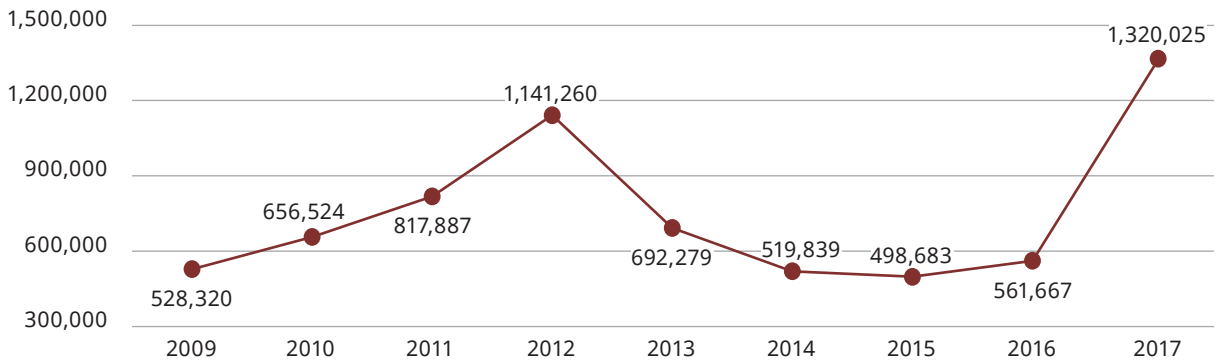
Dividing the numbers by modality, we recorded 1,320,025 students in accredited full DL courses, 1,119,031 students in accredited blended courses, 3,839,958 students in open courses, and 1,459,813 students in corporate open courses. From this section onwards, we once again analyse the data based on a total of 341 institutions that responded to the Census within the deadline.

Chart 4.8 – Total enrollments in DL in Brazil, by type of course



Accredited full DL courses accounted for 1,320,025 students. The historical series shows a quick increase in the number of students in courses in this modality between 2009 and 2012, when most DL educational institutions were created, followed by a decrease between 2013 and 2015, and, since then, a new, extremely quick increase in 2017, due to the new regulations.

Chart 4.9 – Evolution of total enrollments in accredited full DL courses



If we observe the historical series of all modalities, we see that each one suffered a decrease in number of students in different, very precise moments, followed by a new increase. This is a market that is very quick in recovering students. Corporate open courses saw a decrease in number of students in 2012 and 2015, always recovering with a good margin the number of students the following year. Non-corporate open courses felt this decrease in 2013, with a shy recovery in 2014 and coming back strong in 2015, followed by another decrease in 2016 and recovery in 2017. A decrease in blended courses was observed in 2013 and 2016.

Chart 4.10 – Evolution of the number of enrollments, by type of course

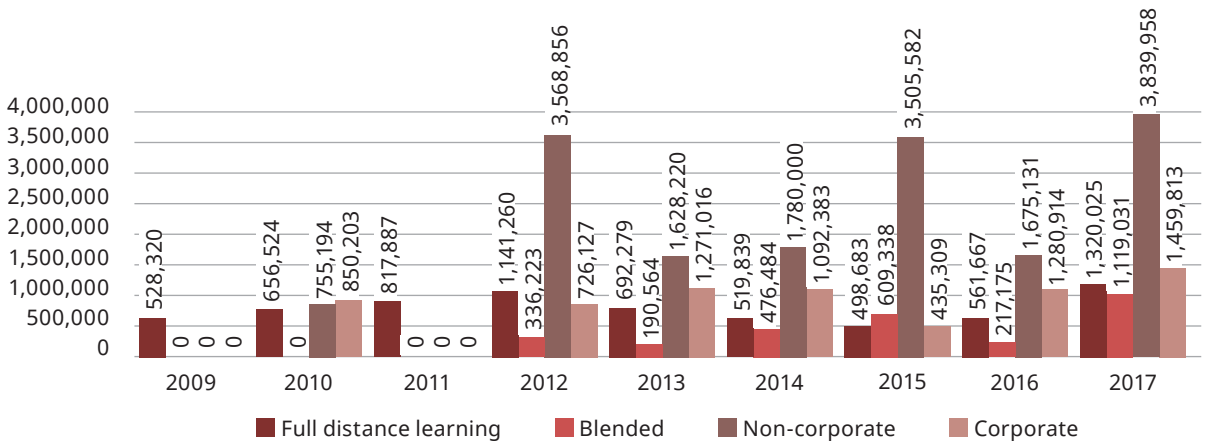


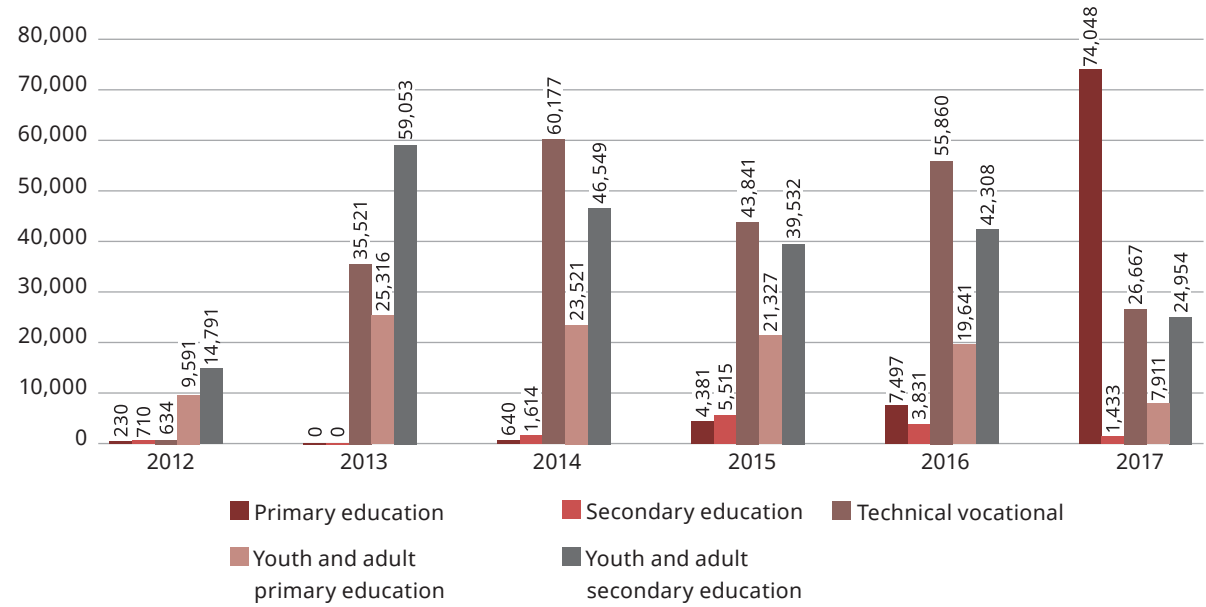
Table 4.1 – Evolution of the number of enrollments, by type of course

	2009	2010	2011	2012	2013	2014	2015	2016	2017
Full DL	528,320	656,524	817,887	1,141,260	692,279	519,839	498,683	561,667	1,320,025
Blended	–	–	–	336,223	190,564	476,484	609,338	217,175	1,119,031
Open non-corporate	–	755,194	–	3,568,856	1,628,220	1,780,000	350,5582	1,675,131	3,839,958
Open corporate	–	850,203	–	726,127	1,271,016	1,092,383	435,309	1,280,914	1,459,813

4.2.2 Enrollments by academic level

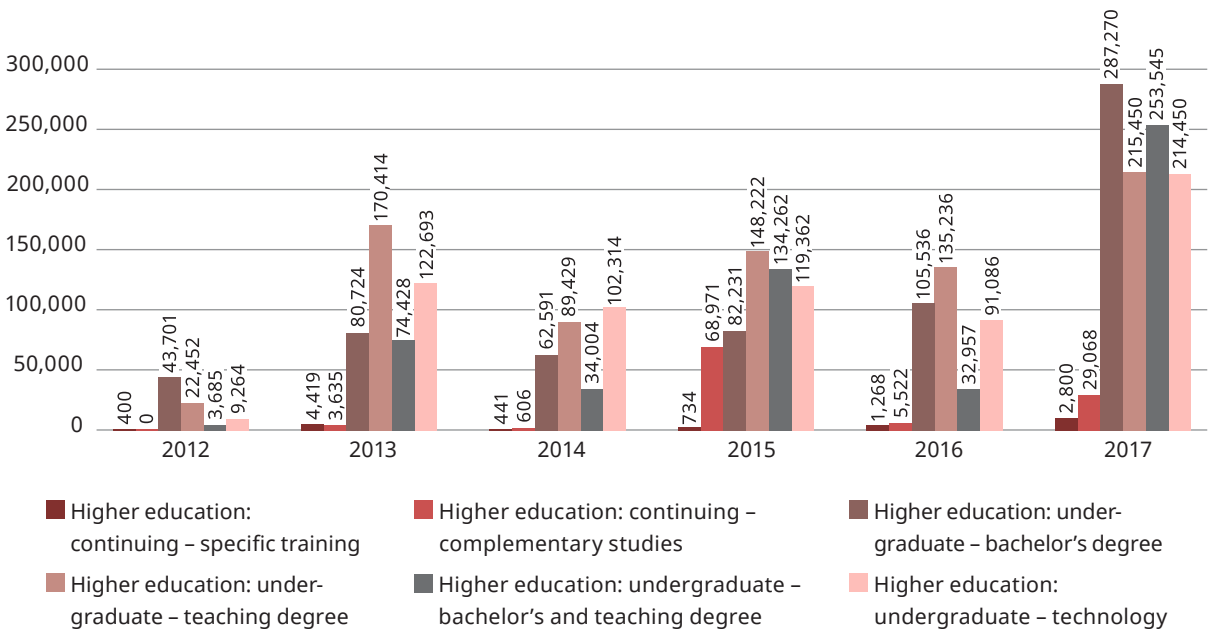
If we observe the distribution of enrollments by academic level, we see a decrease in all levels of basic education since 2013, approximately. The only exception is primary education, which grew in 2017 and reached 74,048 enrollments, corresponding to 5.6% of the total enrollments in accredited full DL courses.

Chart 4.11 – Evolution in the number of students in basic education, by academic level



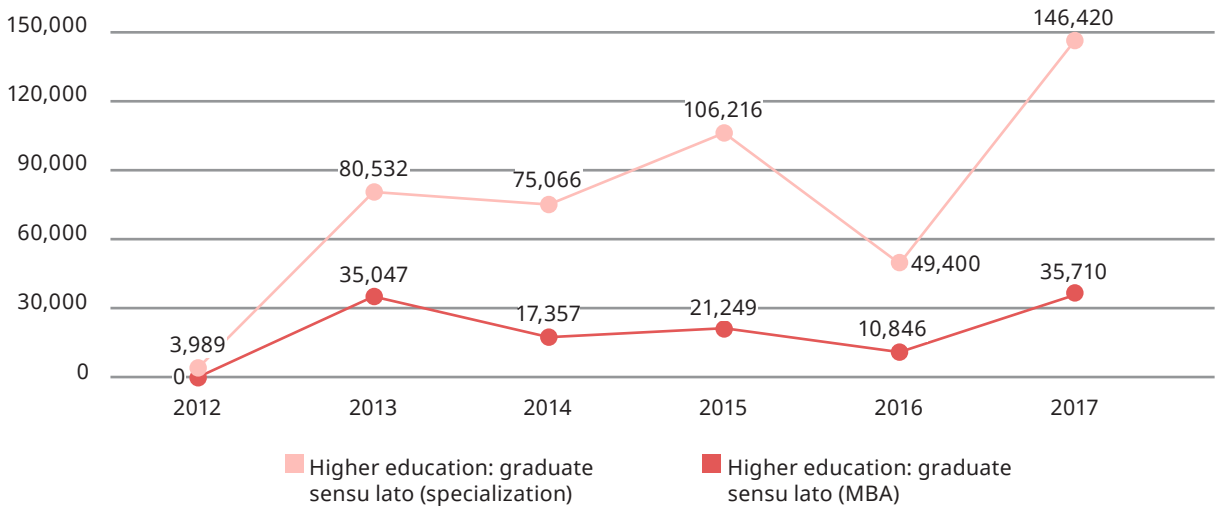
Higher education courses, with oscillating numbers of students since 2013, showed a consistent increase in the number of enrollments in 2017, with bachelor degrees, teaching degrees, and bachelor with teaching degrees having the most students, as shown in the following chart.

Chart 4.12 – Evolution in the number of students in higher education, by academic level



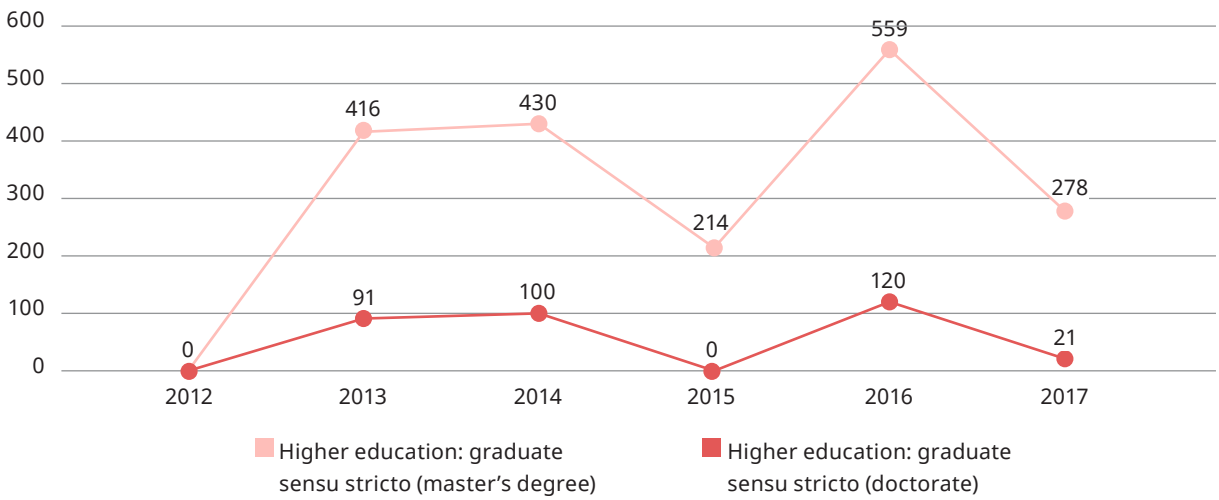
Sensu lato graduate courses, including specialization and MBA, which had a significant decrease in 2016, recovered with ample margin in 2017.

Chart 4.13 – Evolution in the number of students in sensu lato graduate courses



Finally, sensu stricto graduate courses, which appeared for the first time in 2013, don't seem to be a regular offer until now, showing a decrease in number of students in 2017.

Chart 4.14 – Evolution in the number of students in sensu stricto graduate courses

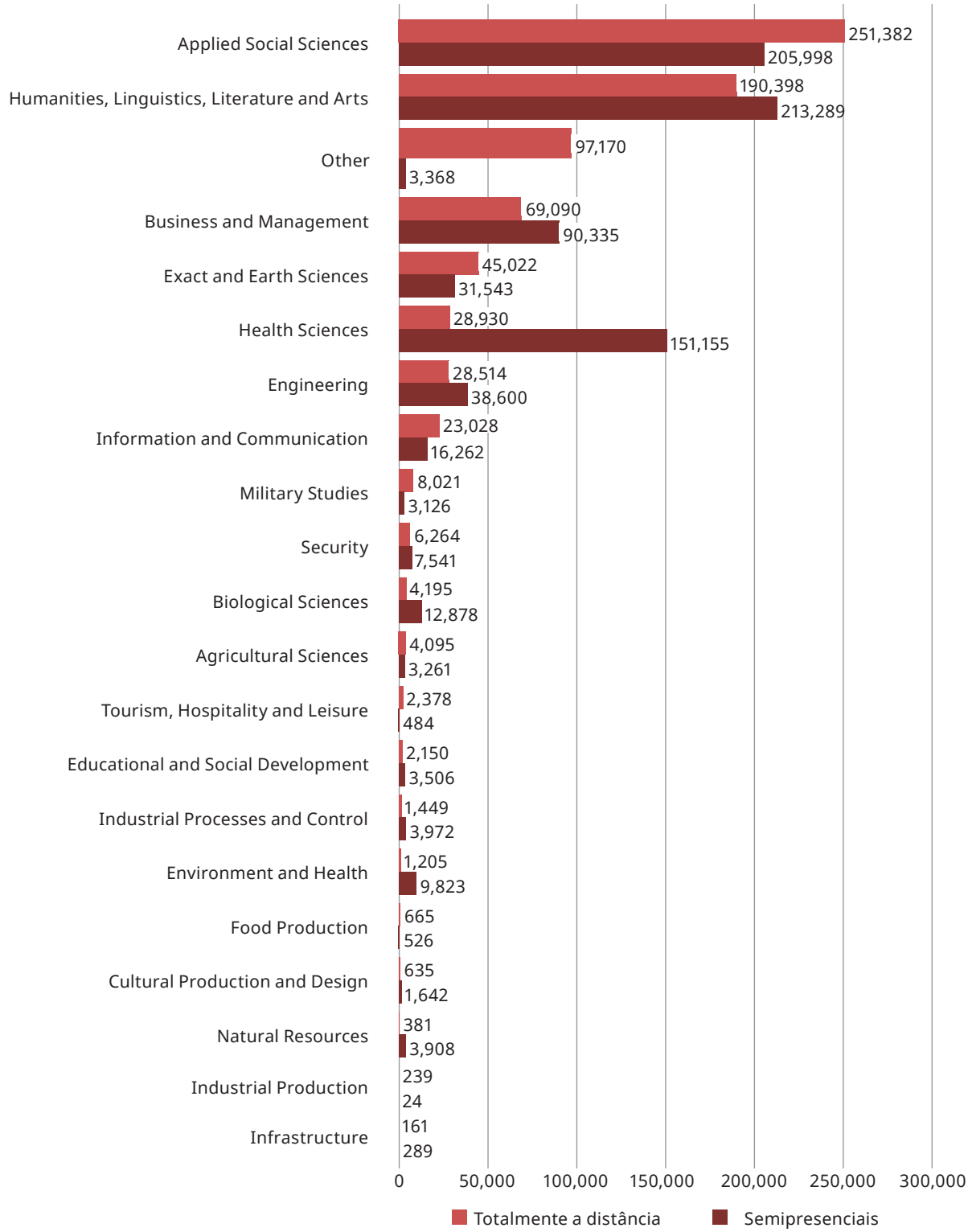


4.2.3 Enrollments by knowledge area

The knowledge area with the most students was evidently Applied Social Sciences, with 251,382 students enrolled, followed by Humanities/Linguistics, Literature and Arts, with 190,398 students in accredited full DL courses. In third we have "other" courses, which shows that students are enrolling in courses that diverge from the traditional offer. In fourth, there's Business and Management, with 69,090 students enrolled in accredited full DL courses.

In this analysis by knowledge area, it is worth noting the majors with the highest incidence of enrollments in blended courses: students of Health Sciences are mostly concentrated in these types of courses. Business and Management, Engineering and Humanities and Linguistics also have most of their enrollments in blended courses.

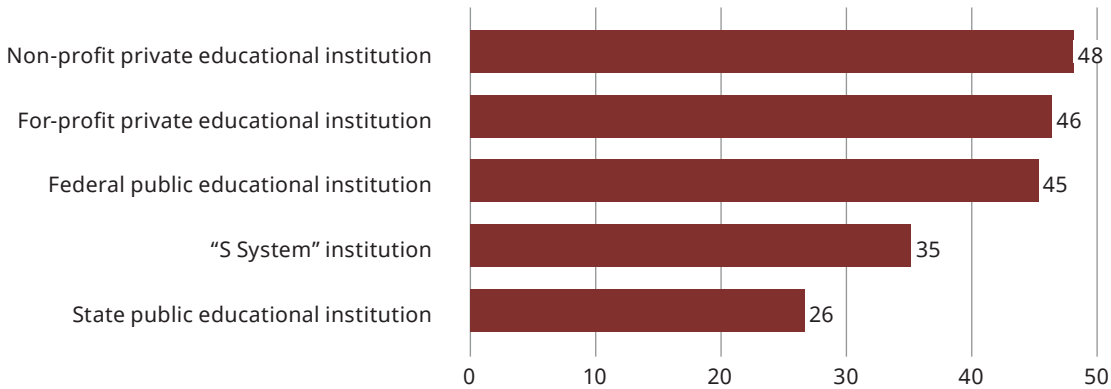
Chart 4.15 – Number of enrollments by knowledge area



4.3 Dropouts

Dropout rates are always a concern in every level and knowledge area, and DL is no exception. It is surprising that fewer than 50% of institutions are aware of the reasons for such dropouts. Divided by administrative category, 45 to 48% of private and federal public institutions are aware of these reasons. Among the S System institutions, only 35% are aware of these reasons, against 27% of state public institutions. Municipal public institutions and NGOs were left out of this analysis, as we had a very small sample of this administrative category.

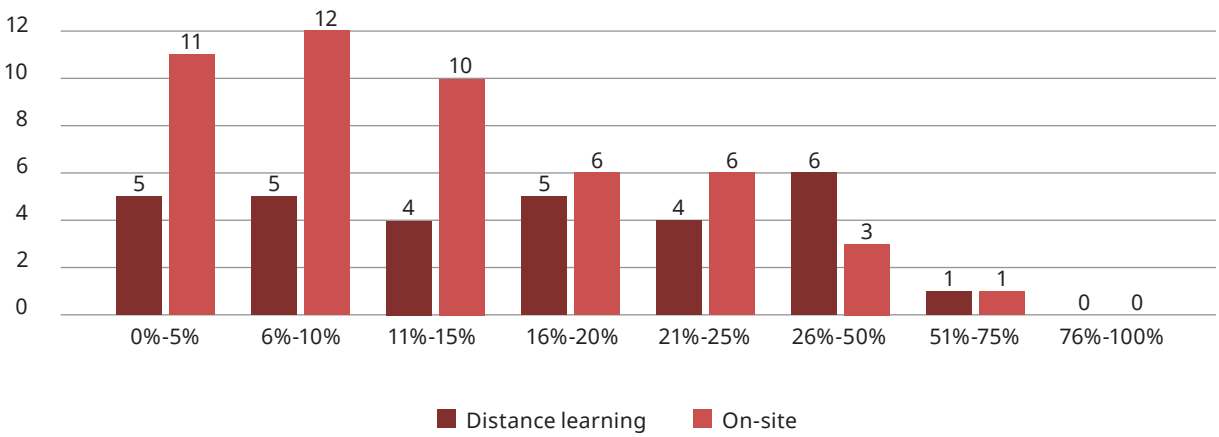
Chart 4.16 – Percentage of institutions that are aware of dropout reasons



Data from the 2017 Census reveal that dropout rates in DL are increasingly closer to those in on-site courses. Dropout ranges above 50% are already at the same rate in both on-site and DL courses. The ranges from 15 to 50% are very similar in on-site and DL courses, with 3 to 60% for on-site and 4 to 6% for DL. Distancecourses still have to see a decrease below 15% in dropouts more frequently to be equal to the pattern observed in on-site courses in Brazil.

These data are consistent with the remark made on the 2016 Census about institutions investing more in courses with higher dropout rates. These investments seem to have had the effect of reducing these rates in 2017.

Chart 4.17 – Comparison between dropout rates of DL and on-site courses



If we compare the dropout rates of the different modalities, we see that open courses still show more than 3% of their courses with rates over 50%. Full DL and blended courses do not show very different rates in the

0-5% range (5.6-5.8%). Corporate courses have a higher frequency of dropout rates in the 16-20% range (4.33% of institutions are in this range).

Chart 4.18 – Dropout rates by type of course

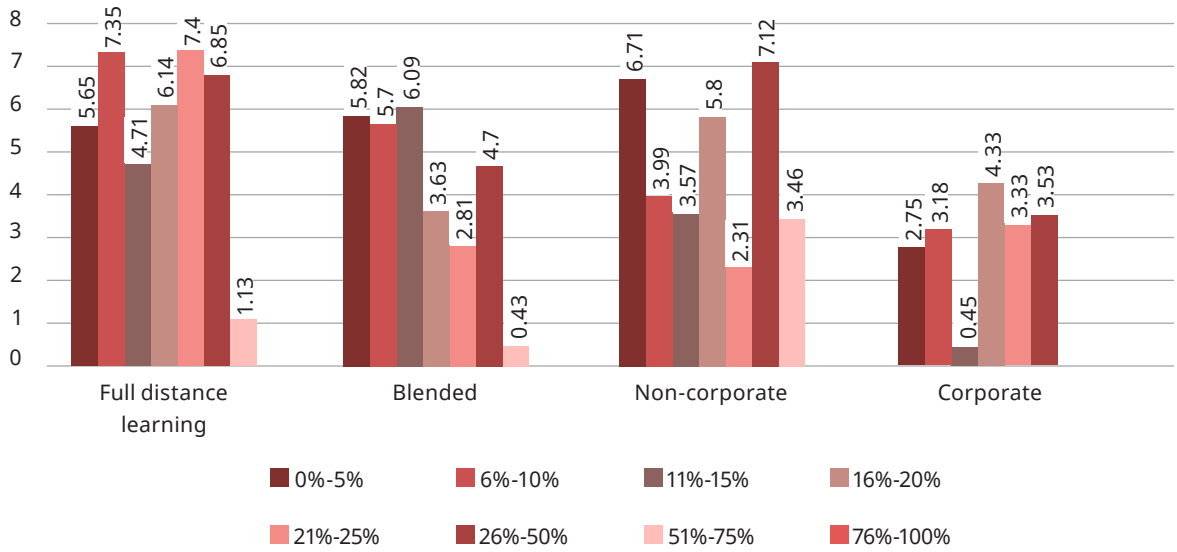


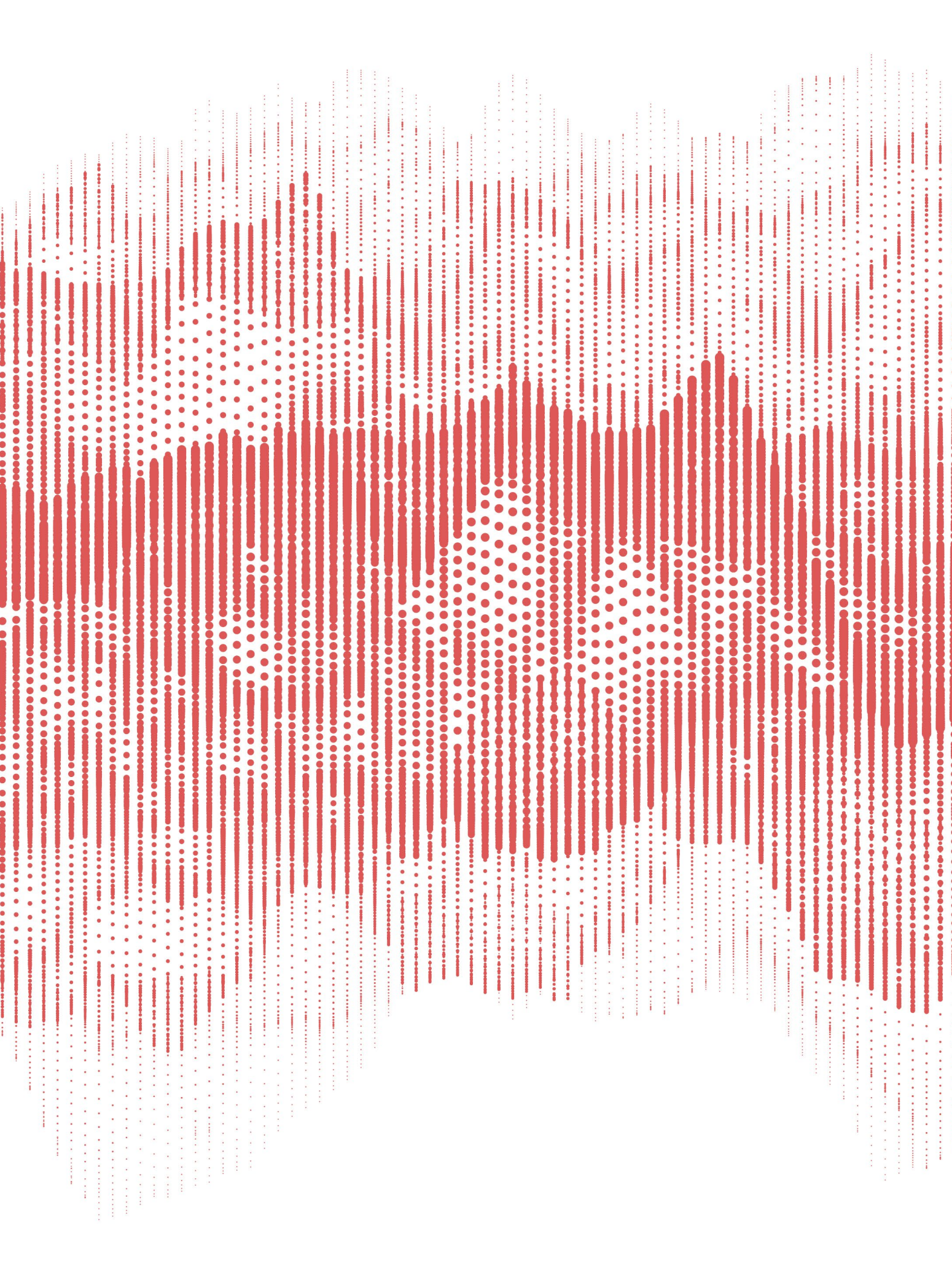
Table 4.2 – Dropout rates by type of course, in percentage

	Full DL	Blended	Open non-corporate	Open corporate
From 0 to 5%	5.65	5.82	6.71	2.75
From 6 to 10%	7.35	5.70	3.99	3.18
From 11 to 15%	4.71	6.09	3.57	0.45
From 16 to 20%	6.14	3.63	5.80	4.33
From 21 to 25%	7.40	2.81	2.31	3.33
From 26 to 50%	6.85	4.70	7.12	3.53
From 51 to 75%	1.13	0.43	3.46	0
From 76 to 100%	0	0	0	0

Dropout rates divided by administrative categories are available in the Tables 4.17 a 4.21, on Annex II.

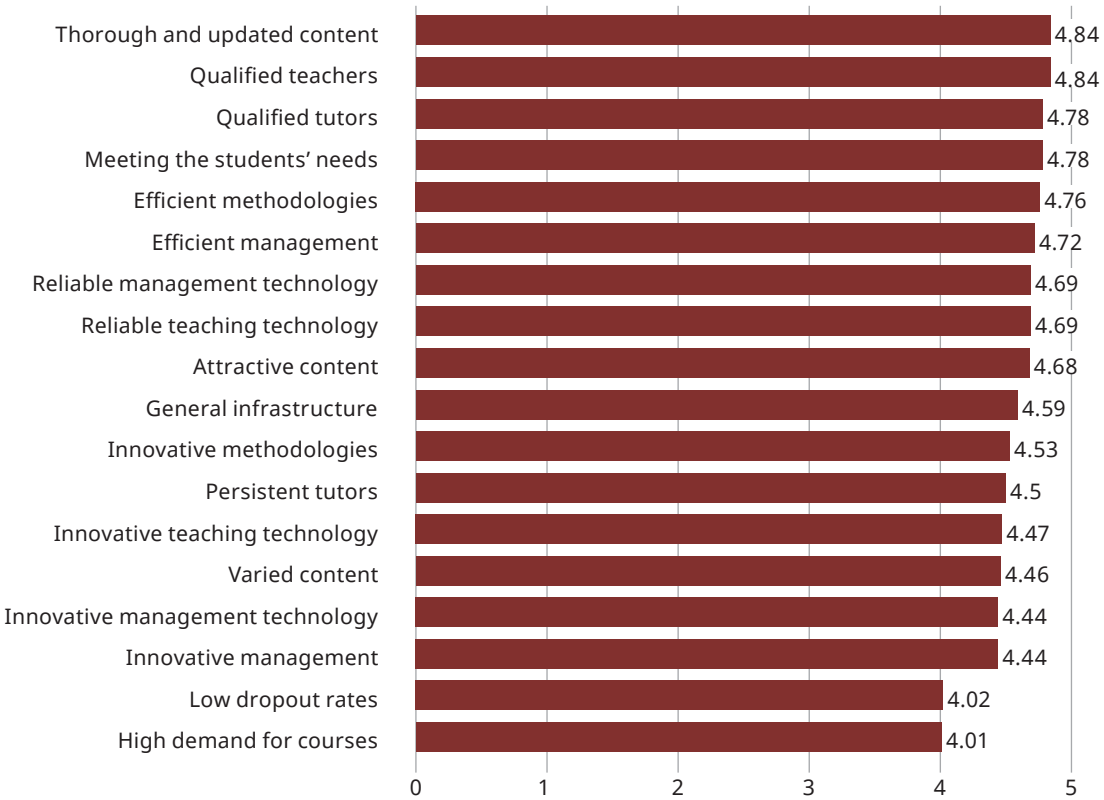
Part 5

The concept of quality in distance learning



The 2017 Census asked institutions if they agreed with a few elements associated with quality in distance learning (DL), rating their choices in a 1-5 scale, 1 meaning "completely disagree" and 5 meaning "completely agree".

Chart 5.1 – Average degree of agreement regarding quality in distance learning, in 1-5 Likert scale



It was possible to observe that, in general, respondents tended to agree that all items in the list were associated to quality in DL. However, if we look at the data more closely and establish a comparison, some patterns emerge.

The two items that depended on the interaction between students and institutions to prove their quality were the least associated to quality in DL. This is an indicator that institutions tend to notice quality criteria as absolute and inherent to the courses offered, rather than relative and dependent on meeting students' expectations. The average for "Low dropout rates" and "High demand for courses" was 4.02 and 4.02, respectively, while the rest varied from 4.44 to 4.84.

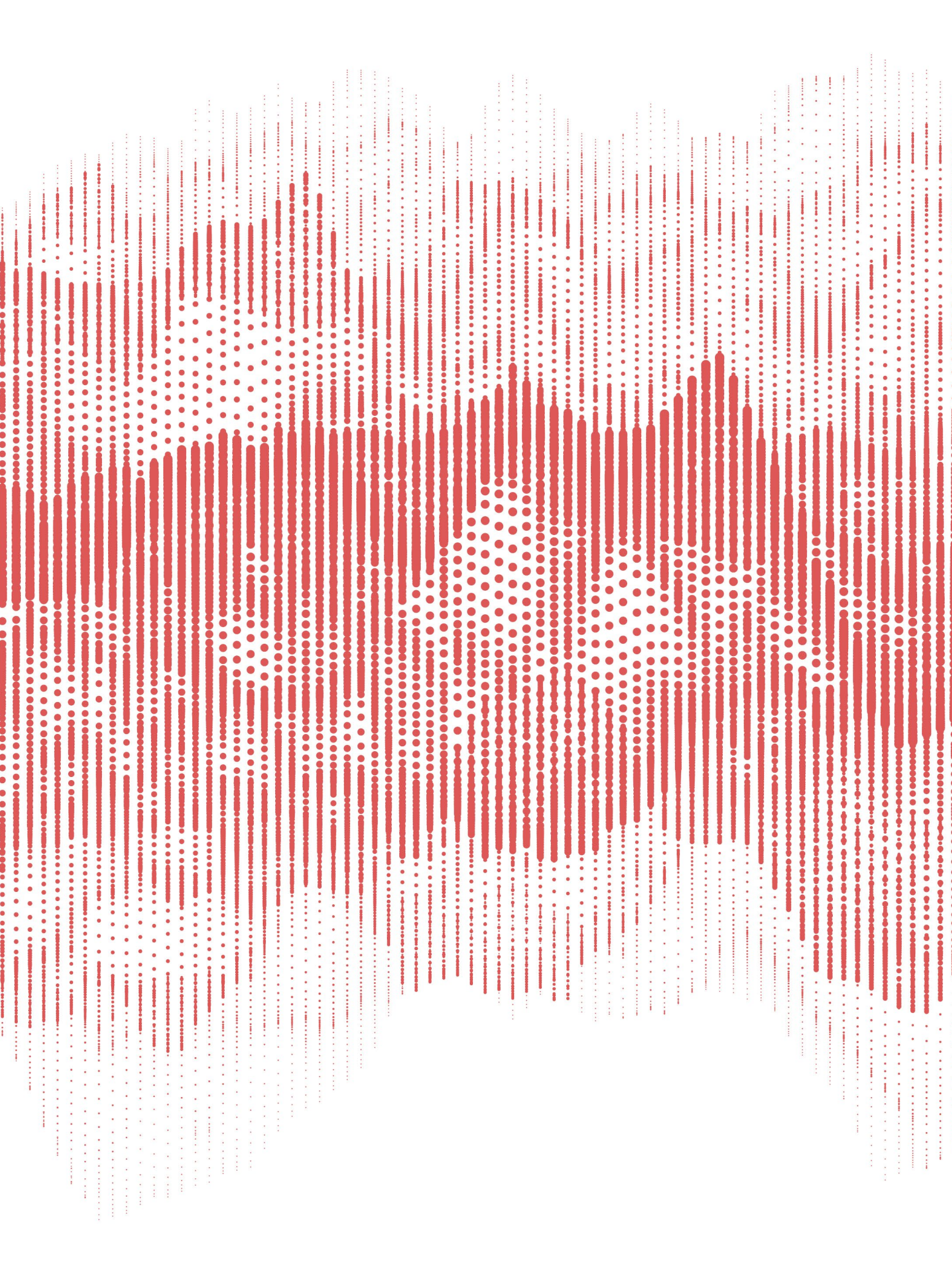
Regarding the five elements that had the highest degree of association with quality in DL, we can state that they do not depend on the modality, revealing that association to quality is related to education in general, not necessarily DL criteria. They are: "Thorough and updated content", "Qualified teachers", "Qualified tutors", "Meeting the students' expectations", "Efficient methodologies" and "Efficient management". The fact that "content" is at the head of the list speaks volumes about the content-oriented nature of Brazilian distance education.

The items associated with quality in DL in the range of 4.44 to 4.69, that is, a very average rate for this sample, are those related to issues that can be specific of DL and the subtleties that can differentiate a course. These are "Innovative management", "Innovative management technology", "Varied content", "Innovative teaching technology", "Persistent tutors", "Innovative methodologies", "General infrastructure", "Well-designed and attractive content", "Reliable teaching technology" and "Reliable management technology".

Apparently, from the respondents' point of view, quality is more associated to thorough courses and qualified and efficient professionals rather than innovative methodologies and management, diverse and attractive content, persistent tutors or appropriate technology and the infrastructure required. If we compare only the terms "efficient" and "inovative", efficient methodology and management were more highly associated with quality than innovative methodology and management. Technology should also be more reliable than innovative, and management and teaching have the same relevance when it comes to technology.

Part 6

Supplying institutions



The Brazilian Census for Distance Learning also hears from supplying institutions, which have an important role in making many of the distance learning (DL) initiatives in Brazil available to the public. In this edition, we had 58 responses to the Census that allowed us to understand who and where are these suppliers, in addition to their roles.

6.1 Location

Supplying institutions are mostly concentrated in the Southeast and South, whereas 31% are located in the state of São Paulo. In total, 18 states are represented. Suppliers tend to concentrate significantly in specific regions, as opposed to educational institutions, which are more equally distributed throughout the country.

Chart 6.1 – Location of supplying institutions, by region, on percentage

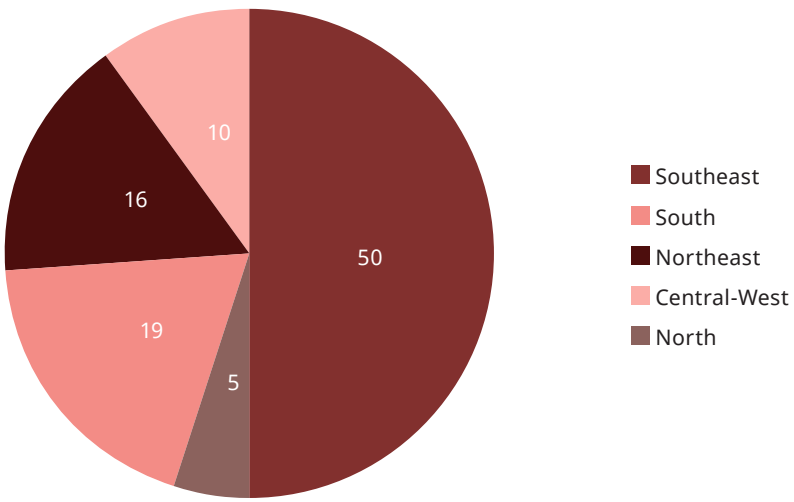
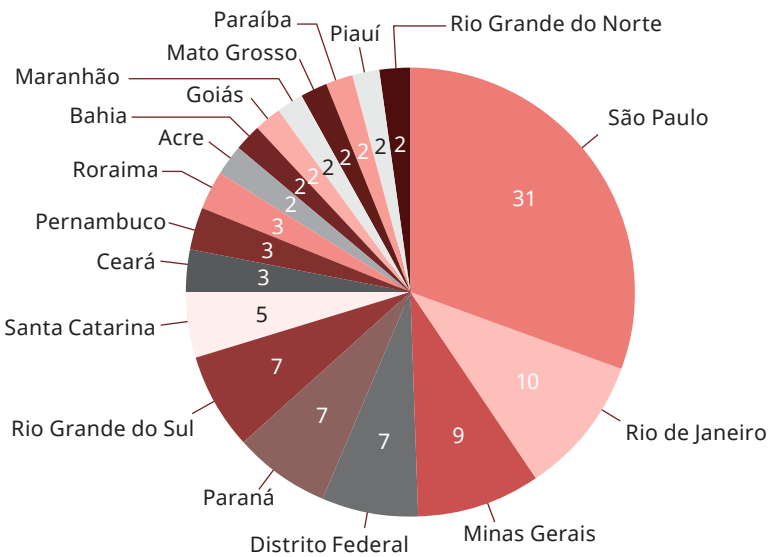


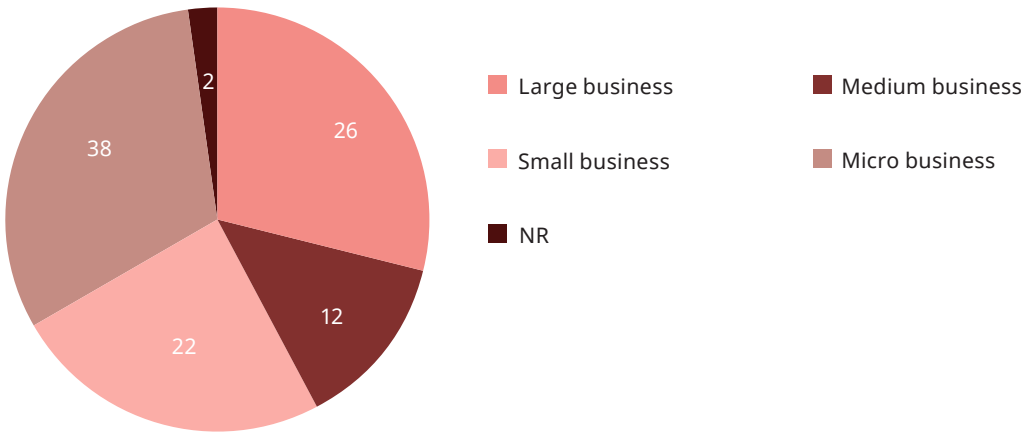
Chart 6.2 – Location of supplying institutions, by state, on percentage



6.2 Size

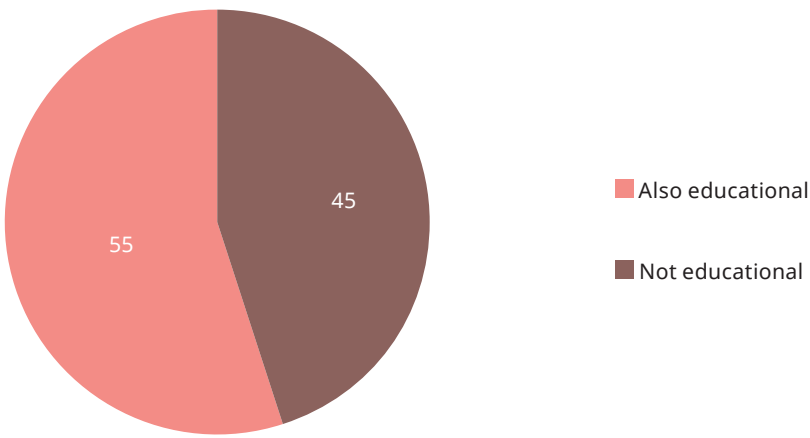
Supplying institutions come in every size: large, medium, small and micro businesses. Micro businesses, in fact, are the majority, at 38%.

Chart 6.3 – Size of supplying institutions, on percentage



It is noteworthy that 55% of supplying institutions are also educational, which indicates that they share their expertise with others.

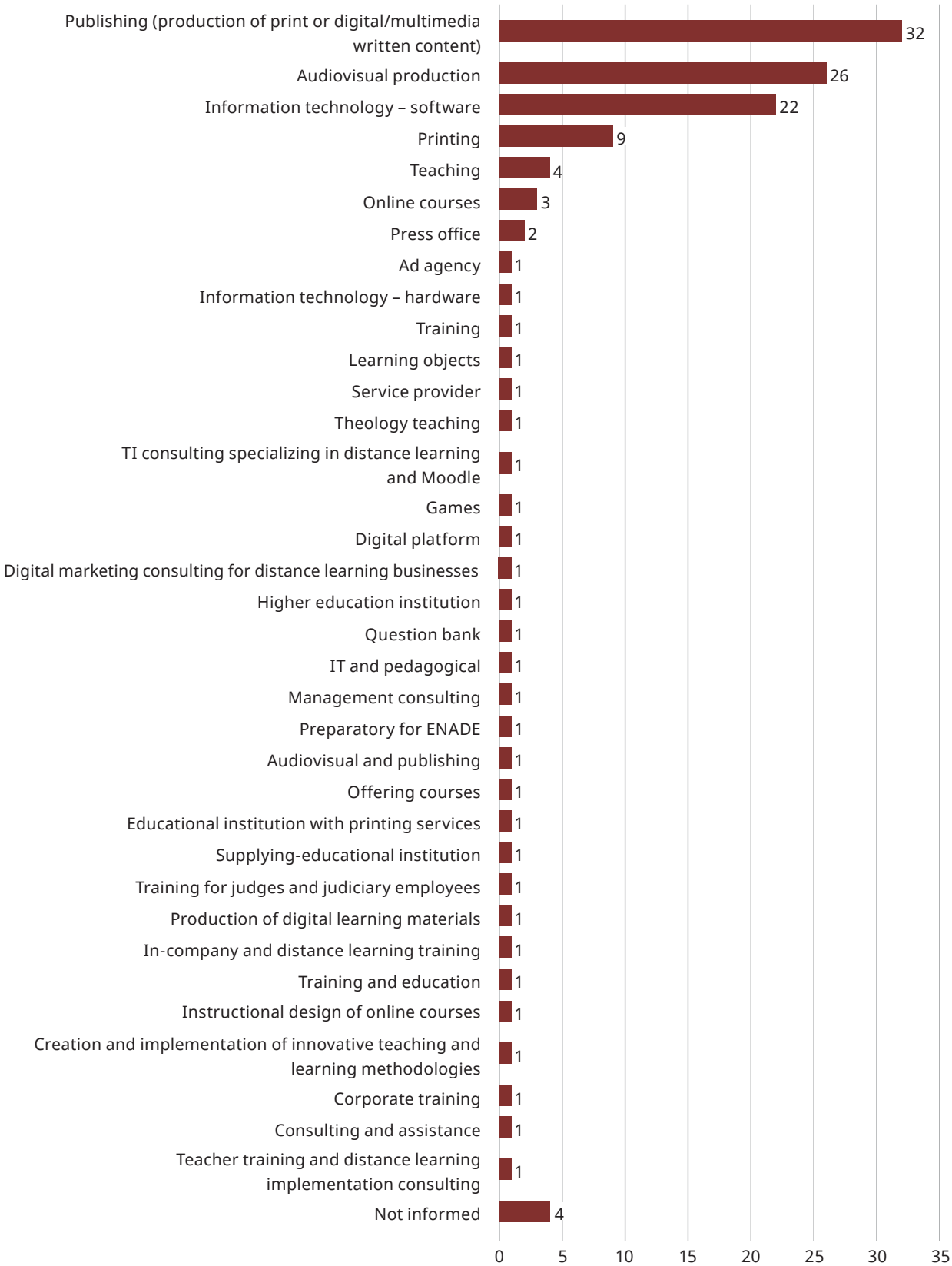
Chart 6.4 – Percentage of supplying institutions that are also educational



6.3 Services provided

The services provided by DL supplying institutions vary greatly. The vast majority of suppliers that participated in the 2017 Census operates in content production, audiovisual production and software production, but many offer very specific services, as shown by Chart 6.5.

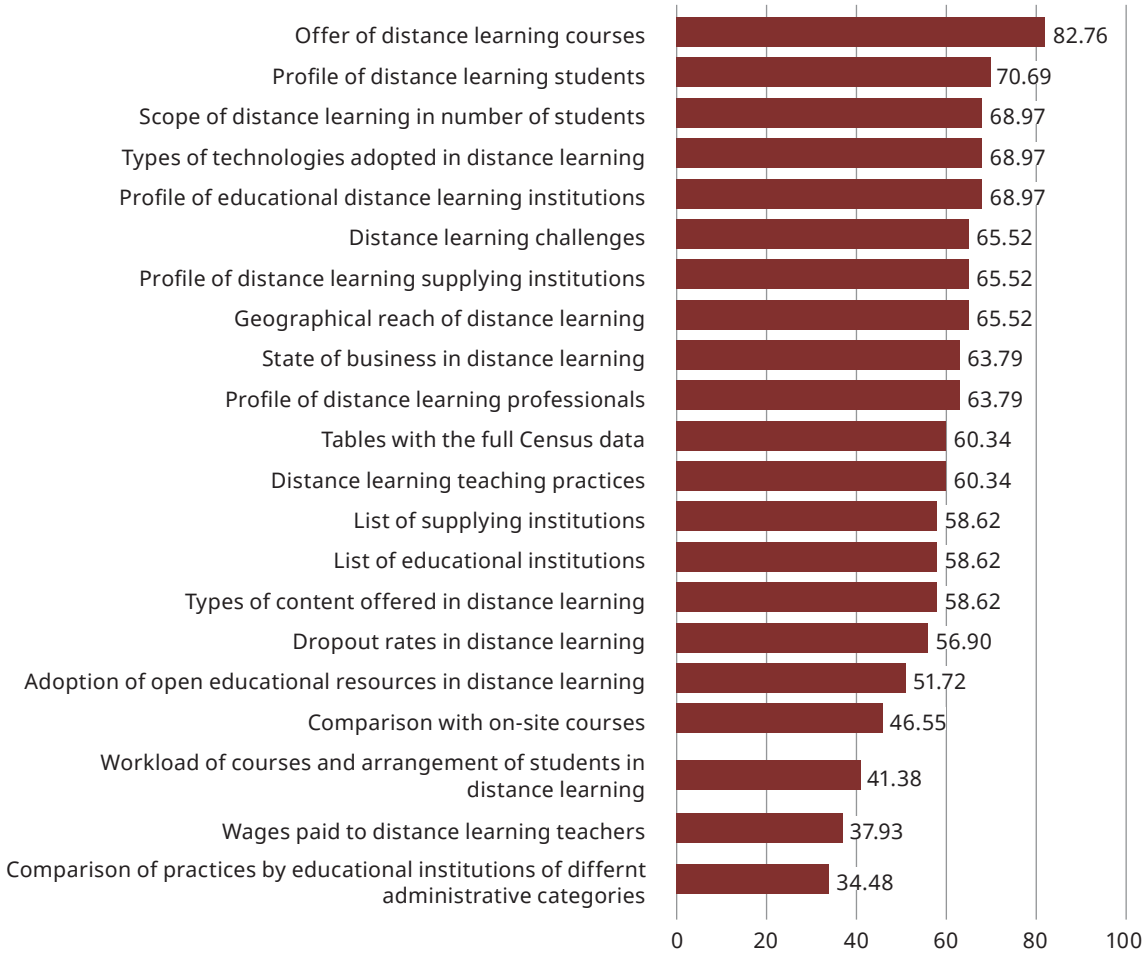
Chart 6.5 – Services provided by supplying institutions



6.4 Interest in the Census

Supplying institutions showed a strong relationship with ABED, and are interested in the analytical topics published by the Census over the years. There is more interest regarding census data such as types of courses offered (83% of supplying institutions are interested in this information), student profile (71% of institutions are interested) and scope of DL, types of technologies adopted and educational institutions (69% of institutions are interested). Given the high degree of interest, the Census appears to be a great help for supplying institutions in defining their strategies and analyzing bigger market opportunities.

Chart 6.6 – Interest for topics already addressed by the Census, in percentage of institutions

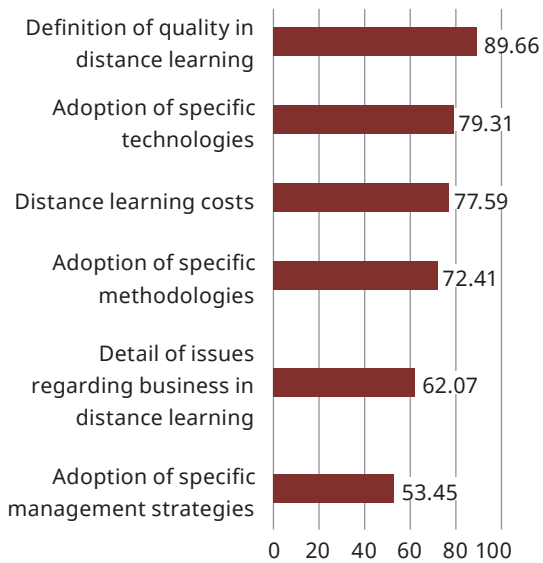


The interest of supplying institutions for the Census is only below 50% when it comes to the comparison with on-site courses, workload of courses and student grouping, wages paid to teachers and comparison between institutions of different administrative categories. The focus of supplying institutions, therefore, is to understand the behavior of the market and its growth, but not necessarily the internal works of educational institutions.

6.5 New topics to be addressed by the Census

Regarding topics that had not yet been addressed by the Census, respondents showed interest for the definition of quality in DL (90% of respondents are interested) and the adoption of specific technologies (79%). Management strategies are a topic of interest for only 53% of respondents. We will keep an eye on this demand for future editions of the Census.

Chart 6.7 – Interest for topics to be addressed by the Census, in percentage of institutions



Specific topics of interest regarding each of these components

- Adoption of specific technologies
- Accessibility
- Following up on DL alumni to assess employability
- Smart VLEs
- Entrepreneurship
- Games
- Gamification
- Artificial intelligence
- Artificial intelligence, machine learning, augmented reality
- Teacher × student interaction in DL
- Programming languages
- E-books in epub format
- New DL technologies
- New VLEs, content exposure facilitation tools
- Platforms
- DL platforms and mobility
- Production of multimedia content by teachers
- Infoproduct sales software such as Infusion, among others
- Assistive technologies
- All immersive technologies
- Videos

Adoption of specific methodologies

- Blended learning
- Course didactics
- Use of active methodologies
- HTML, SCORM and games
- Learning material, class script and online expository class
- Active methodologies
- Methodologies that improve and facilitate course management
- Why the student chose DL
- Separate data on technical and higher education courses
- Use of Google

DL business

- How DL university curricula are created
- Learning cost
- Cost of DL content production (by workload)
- Entrepreneurship
- General statistics
- Supplying institutions business models
- Cost spreadsheets
- Number of companies in the industry
- Time between hiring a content producer and payment
- Tutoring
- Use of new DL technologies

Adoption of specific management strategies

- Adoption of production and personnel management methodologies and techniques and expansion strategies

- Cost of investment per student
- Process engineering
- Moodle and MOOCs platform management
- Implementation of DL and cultural shift
- Tutoring costs model
- New DL technologies
- Pricing
- SAS

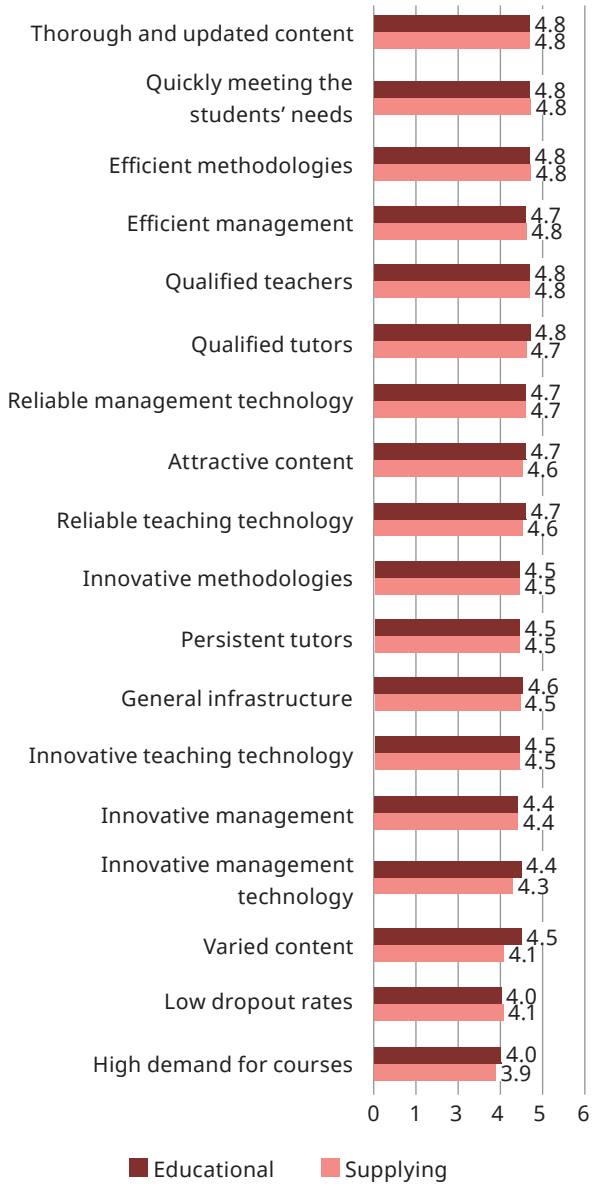
Other

- How to design DL classes
- Data on job placement of DL alumni
- Special education in DL
- Inclusive education
- Teacher training for DL
- Student learning management methodologies
- New teaching propositions
- Rank of educational institutions
- Most used audiovisual/digital resources
- Use of DL games
- Use of DL in law institutions

6.6 Quality in distance learning

One of the topics of interest of educational institutions, quality in DL, has been addressed by the 2017 Census. It is worth noting the similarity between the responses of educational and supplying institutions. Evidently, all components listed in the survey are considered extremely important for everyone in the DL community.

Chart 6.8 – Average degree of agreement of supplying and educational institutions regarding quality in DL, in 1-5 Likert scale



However, it is still possible to make a few more specific analyses on these data. The topics on which both supplying and educational institutions tend to have similar opinions are the following:

- Efficient methodologies
- Quickly meeting the students' needs
- Persistent tutors

- Innovative methodologies
- Innovative teaching technology
- Thorough and updated content
- Reliable management technology

And the topics that supplying institutions consider more relevant than educational institutions are the following:

- Low dropout rates
- Efficient management

Suppliers consider these topics more critical than educational institutions, whether because they do not deal with these issues on a daily basis or because they already have propositions for them.

Finally, the topics that educational institutions are more concerned about than suppliers are:

- Attractive content
- Qualified teachers
- Reliable teaching technology
- Innovative management
- Qualified tutors
- High demand for courses
- Innovative management technology
- General infrastructure
- Varied content

It is possible that these are pointing to opportunities for supplying institutions to offer products and services that cater to the unmet needs of their potential clients.

Supplying data

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	Coracy Teixeira Monteiro	(85) 98823 9209	cruzverde.ce@gmail.com	Courses in Workplace Health and Safety.
	Pedro Luiz Furquim Jeangros	(85) 99614 6421	pedro@ensetec.com	Consulting in implementation of virtual learning environments. Consulting and advisory in instructional design, educational design, content production in general. Training.
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	Márcio Martins	(61) 3216 7632	marcio.martins@camara.leg.br	Courses with tutoring, self-instructional, videos, flows and other distance learning products.
	Jader de Sousa Nunes	(61) 2020 3003	jader.nunes@enap.gov.br	Enap offers distance learning courses in different fields, aimed at a broad audience, contemplating public employees and citizens. The Enap Virtual School offers services in course hosting (in Mooc and Spoc environments), academic management, certificate issuance, school transcript, data consolidation and treatment.
	Rafael De Alencar Lacerda	(61) 3051 1366	rafael@raleduc.com.br	We are a company specializing in distance learning. Our purpose involves: 1) implementation, maintenance and support in the Moodle platform; 2) course and training design with the best distance learning practices; 3) specialized management and tutoring that guarantee higher effectiveness and lower dropout rates; 4) licensing of proprietary online solutions; and 5) specific consulting for special projects.
	Mayra Caiado Paranhos	(62) 3246 1496	mayra.paranhos@anhanguera.edu.br	On-site disciplines, complementary distance learning activity and distance learning courses.

(continue)

(continuation)

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	Lucas H. S. Oliveira	(31) 99738 8382	lucas@hotmart.com	Hotmart is the most complete tool for those seeking to sell online courses. Leader in the digital products market in Latin America, the platform offers distance learning with several tools for sales automation, affiliate programs, conversion-driven payment methods and much more.
	Pedro Filizzola	(31) 99135 2225	pedro.filizzola@sambatech.com.br	A complete platform for safely managing and distributing videolessons (piracy protection), scalability, streaming quality, video consumption reports, integration with the market's main LMSs, and student experience functionalities.
	Vicente Frattezi	(31) 8835 6335	vicente@webaula.com	Full distance learning training solution.
	Gerson Broggini	(34) 99976 5735	gerson.broggini@gmail.com	Development of customized e-learning courses.
	Silvane Guimarães Silva Gomes	(31) 3899 1099	silvane.cead@gmail.com	The Coordination for Open and Distance Learning (CEAD) coordinates, supervises, advises and offers technical support to distance learning activities at UFV. We offer support in producing learning materials (printouts, videos, narrated classes, tutorials, animations, simulations etc.) for on-site and distance learning disciplines. Our team works with a proprietary virtual learning environment (VLE), called PVAnet. In 2017 we offered specialization courses, sensu lato graduate courses, one professional master's program, and at the UFV-Florestal campus we offered technical courses.
	André Kioshi da Silva Nakamura	(67) 3378 9636	andre.nakamura@ifms.edu.br	Our institution offers free distance learning courses, from initial and continuing education to graduate programs.
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(continuation)

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	Vanessa de Abreu Passos	(86) 3131 4843	vanessaabreu@ifpi.edu.br	We currently offer 13 technical courses in the Mediotec program and one course in the Profuncionário program.
	Argemiro Aluísio Karling	(44) 99961 4640	argemiro.karling@fainsep.edu.br	FAINSEP offers undergraduate and graduate sensu lato programs.
	Diego Figueiredo Dias	(44) 3301 9412	diegofigueiredo@yahoo.com.br	HUBe is an integrated educational solutions company created to quickly and professionally meet all the demands of the educational field. Ours partners are known worldwide, and we cater to the world's largest financial, education and technological groups. Our solutions comprise virtual learning environments, learning materials, student performance management systems, international certification and consulting in: finance, marketing, pedagogy, management, expansion and distance learning accreditation.
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	Pedro Filipe	–	contato@universoenfermagem.com	Online courses.
	José Luiz Lordello	(21) 3228 3244	jl.lordello@eaducativa.com	Virtual learning environment (LMS); production of content and materials (courses, learning objects, disciplines); distance learning consulting for higher education institutions and training and development for companies; mentoring for digital entrepreneurs; digital marketing; sales of courses.
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(continuation)

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	Ricardo Picolli Carvalho	(54) 3454 5616	keko@dwrsomeluz.com.br	We are a company specializing in sound, light, image and special booths. We started our business in 2000 in Bento Gonçalves (RS) and built a trajectory on the constant pursuit of our customers' satisfaction. This satisfaction was attained by the personalized support held in the availability of equipments and resources connected to the most innovative technological tendencies, which made DWR Som, Luz e Imagem a company that stands out in its segment throught its differentials, seeking to meet the customers' needs from the first proposal to the day of the event, allowing adjustments to better deliver. Specialized team with trained professionals ready to offer solutions and fine-tune details.

(continuation)

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	Carlos Manoel Pozo	(51) 99633 3116	cmcpozo@gmail.com	Digital marketing consultant and expertise as a social entrepreneur. Addicted to music, entrepreneurship, marketing and distance learning. I seek to build great partnerships. My passion is to learn, and teaching is what moves me!
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	Gustavo de Oliveira Rohde	(48) 99961 2439	gustavo@ilog.com.br	Ilog is the largest Brazilian specialist in LMS and virtual learning environments. Our LMS Konviva is used by over 500k users in Brasil, and we are flexible, innovative and reliable in meeting the needs of institutions of all sizes and learning modalities.
	Dênia Falcão de Bittencourt	(48) 99946 6956	denia.falcao@gmail.com	We offer society the following specialized educational services: consulting; courses; coaching; groups and research orientation; teaching; lectures and content production. Services provided: distance learning; digital education and network technologies; blended learning; active methodologies; educational design; corporate education. Educational innovation: teacher training in the use of digital technologies in their practices. EduCommunication: digital convergence; hypermedia and hypertext; new learning spaces. Corporate education: people, competences and knowledge management. Instructional design: projects in learning and evaluation. Customized projects.
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(continuation)

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Eduardo Penterich	(11) 99629 4141	educardo.penterich@hotmail.com	Instituto Educar keeps seven on-site support hubs in the state of São Paulo and operates in partnership with UNISA – University Santo Amaro in offering undergraduate and graduate distance learning programs accredited by MEC.
Pastor Hermes	(19) 3392 0394	pastorhermes@msn.com	Our institution offers Theological Education courses for members of the church, training Christians that wish to develop their ministry in balance and with honesty.
Pastor Hermes Nascimento	(11) 99709 8539	pastorhermes@msn.com	We are a philanthropic institution: we offer Theological Education for all Christians, with no discrimination, that is, we accept everyone, even if they don't confess any religious beliefs.
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Raquel Motta	(11) 99599 2155	prisma@prismaconsultoriaemsaude.com.br	We create educational distance learning projects and optimize the use of technological resources for formative and corporate educational. We create and produce distance learning materials.
Gustavo Meireles de Castro Lima	(11) 2501 3492	gustavo@agenciawebnauta.com	Webnauta specializes in the development of learning objects and educational resources for distance learning courses capable of enriching and powering the teaching-learning process for companies and educational institutions based on hypermedia solutions that create a dialogue with students, guided by consistent and efficient pedagogical methodologies and strategies. Founded in 2012, we are recognized by the care we put into the value of our services, the compromise with our clients and the creation of unforgettable distance learning courses.
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Vera Lúcia Vieira	(11) 99407 9113	verav@customersat.com.br	Distance learning content, distance learning teaching in marketing, communication and business management. We also provide services in website promoting, SEO marketing and social media consulting.

(conclusion)

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Faculdade de Tecnologia Finaci	Pça. Pedro Lessa, 41	SP	São Paulo	yara@finaci.com.br	finaci.com.br
IBET – Instituto Berety de Ensino Teológico	R. Rio Mambituba	SP	São Paulo	ibet.secretaria@gmail.com	–
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Plus-It Consultoria em Informática Ltda.	R. James Watt, 142, Cj. 102	SP	São Paulo	contato@plus-it.com.br	plus-it.com.br
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Luis Cesar Dias Morais	(11) 98193 2921	luiscdm@ fabricadeconteudos. com.br	Development of customized educational content and learning objects for on-site, blended and distance learning. Creation of workshops using active methodologies, as well and teacher and tutor training. Construction and remodeling of PDI, PPI and PPC, formation of distance learning teams, hub creation and/or expansion, installation and maintenance of VLE/LMS.
Yara Esmeralda Di Arena	(11) 3326 0238	yara@finaci.com.br	This is a new pedagogical experience with moments full interaction among participants, called synchronous, and others where the student can review the content, called asynchronous. The use of the platform is simple and intuitive. Contact with teachers and classmates is very rich. The platform allows receiving works.
Ricardo Jorge Tenório de Oliveira	(11) 98660 5954	Dra.contato@ yahoo.com.br	We are a theological teaching company aiming to prepare men and women to better develop their conviction in the sacred scriptures.
Eduardo Lippi	(11) 98508 0014	elippi@maskott.com	The Tactileo authoring tool is cloud-based, making it easy to share learning objects among authors using virtual libraries, creating interactive online content that users and students can access on smartphones, tablets or computers, in APP or by external link, or even exported to virtual learning environments.
Rosane Freire Marques	(11) 5103 0067	rmarques@ plus-it.com.br	Distance learning platform – Moodle: implementation, configuration, training and support; Web development; mobile development (Android, iOS); content creation, layout and publishing. E-commerce platform – Magento: implementation and configuration; integration with legacy systems; integration with LMS – Moodle; assisted operation and store support (technical and operational).
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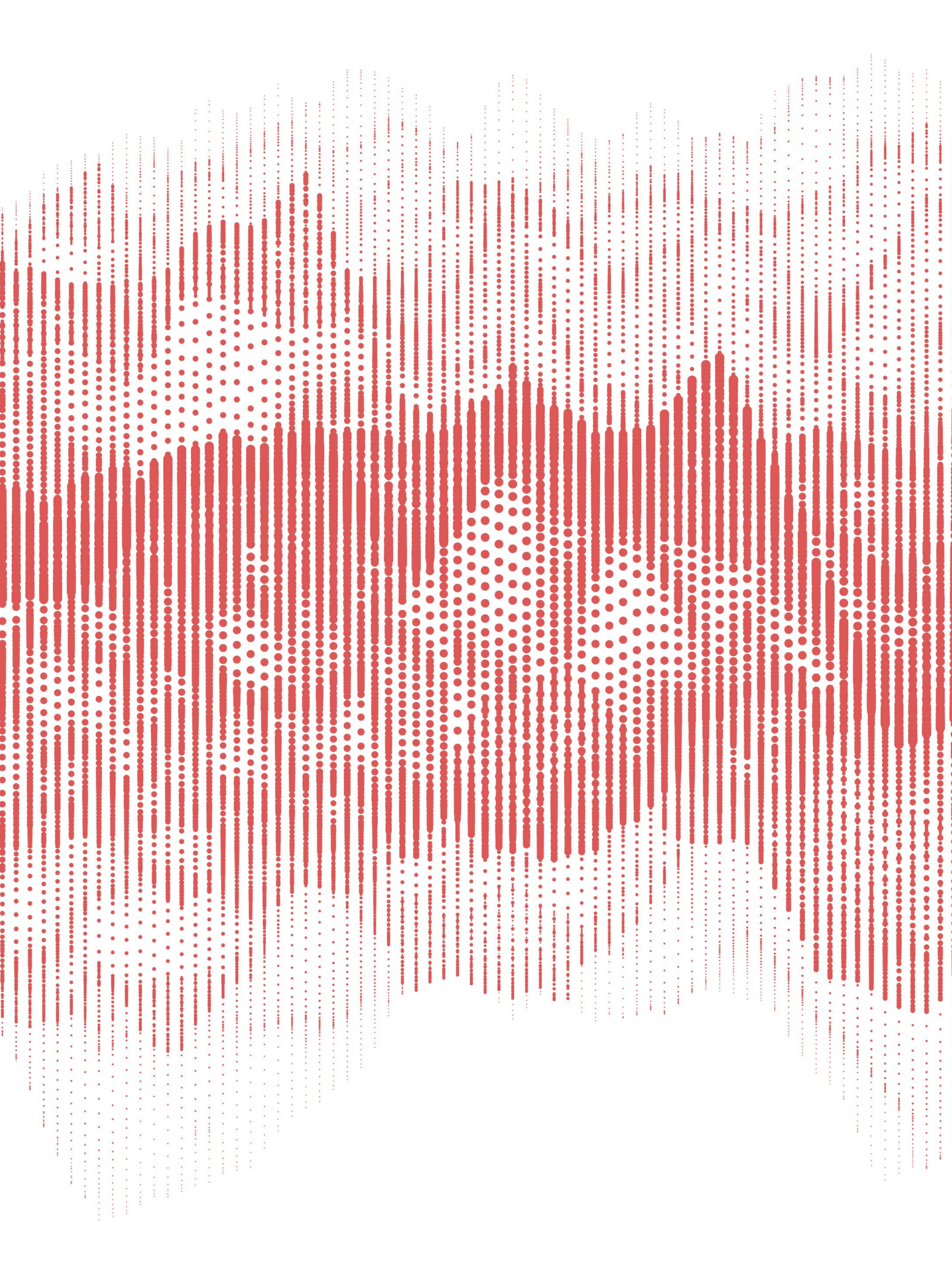
Part 7

Profile of students



In the 2017 Census, we collected some more data about the profile of distance learning (DL) students. In addition to gender and age, which we had raised previously, we included race/color, type of school of origin and social class.

This profile survey was carried out based on the responses of 251 institutions. Of these, 203 offer DL courses, 156 offer blended courses, 156 offer open non-corporate courses and 73 offer open corporate courses. Percentages were calculated based on the total number of respondents for each question.

The data presented here are based on the number of institutions that answered each question, according to the following table.

Table 7.1 – Number of institutions that answered each question about the profile of students

	Full distance learning	Blended	Open non-corporate	Open corporate
Gender	135	84	91	43
Race/color	72	56	48	22
School of origin	91	64	54	20
Social class	63	45	46	22

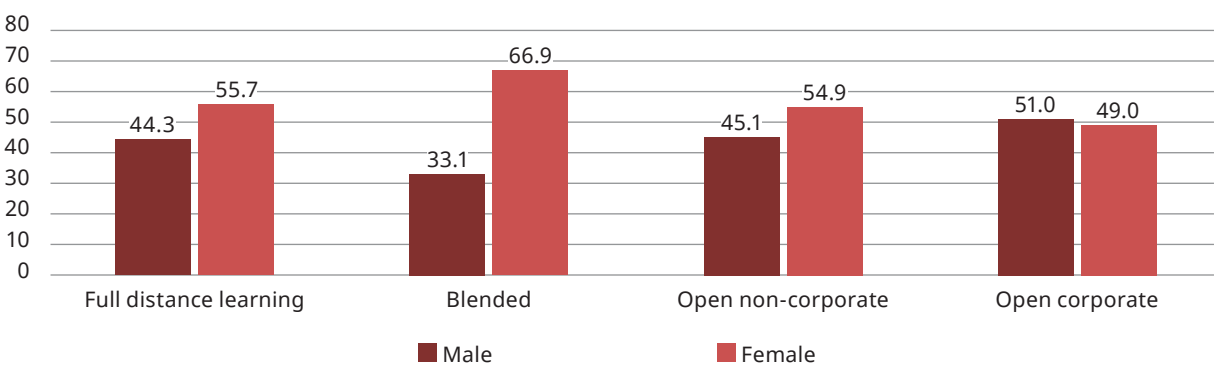
From these data, the percentages for each category were calculated. The results are presented below. In 2016, the data were separated by administrative category. This year, by type of course. We understand that the profile of the students does not change much from one year to the other, and that a different analysis could bring forth different views on this topic.

7.1 Gender

Regarding gender, although we asked for the category "Other/prefers not to declare", no institutions responded about this category. This means that educational institutions only have information about the gender of students in the "male" and "female" categories, and it appears that students are not asked about any other gender.

The data draw attention to the equal proportion between genders in open corporate courses. In all others, women are the majority, making up approximately 55% of the students in open non-corporate and accredited full distance learning courses, and 66% of blended courses.

Chart 7.1 – Profile of distance learning students by gender, in percentage



7.2 Social class

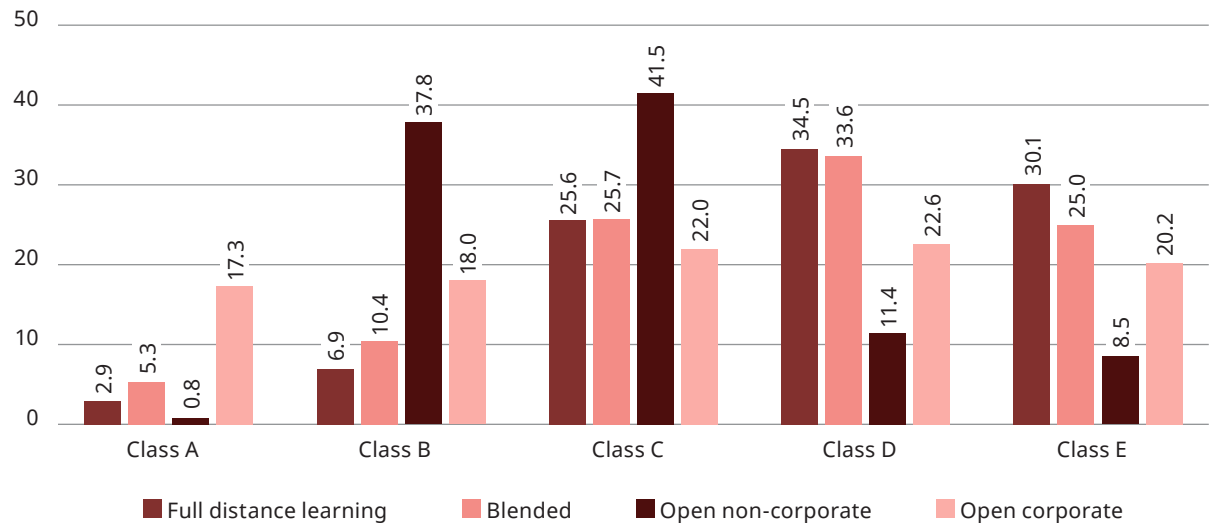
The social class analysis was made based on the following classification:

- Class A: family income of over 20 Brazilian minimum wages, more than R$ 18,740.01
- Class B: family income of 10-20 Brazilian minimum wages, R$ 9,370.01 – R$ 18,740.01
- Class C: family income of 4-10 Brazilian minimum wages, R$ 3,748.01 – R$ 9,370.00
- Class D: family income of 2-4 Brazilian minimum wages, R$ 1,874.01 – R$ 3,748.00
- Class E: family income of up to 2 Brazilian minimum wages, R$ 1,874.00

The results show that, in full DL courses, there is a predominance of students in classes C, D and E, with 34% of students in these courses belonging to class C and 30% in class E. In blended courses, there is a predominance of classes C, D, and E, but fewer students in class E (25%). We are already seeing 10.4% of students in class B and 5.3% in class A. These results do not mean, however, that only those who do not have financial resources study at a distance.

When attending non-corporate courses, in which students participate of their own free will without any commitment to certification regulated by the Ministry of Education or career points given by the employer, we have a higher proportion of students in classes B (37%) and C (41.5%). In corporate courses, the ratio is equivalent, but we must remember that these courses are usually paid by the employer, and the social class of the student makes no difference in paying the course, but in getting the job that gives access to this modality.

Chart 7.2 – Profile of distance learning students by social class, in percentage



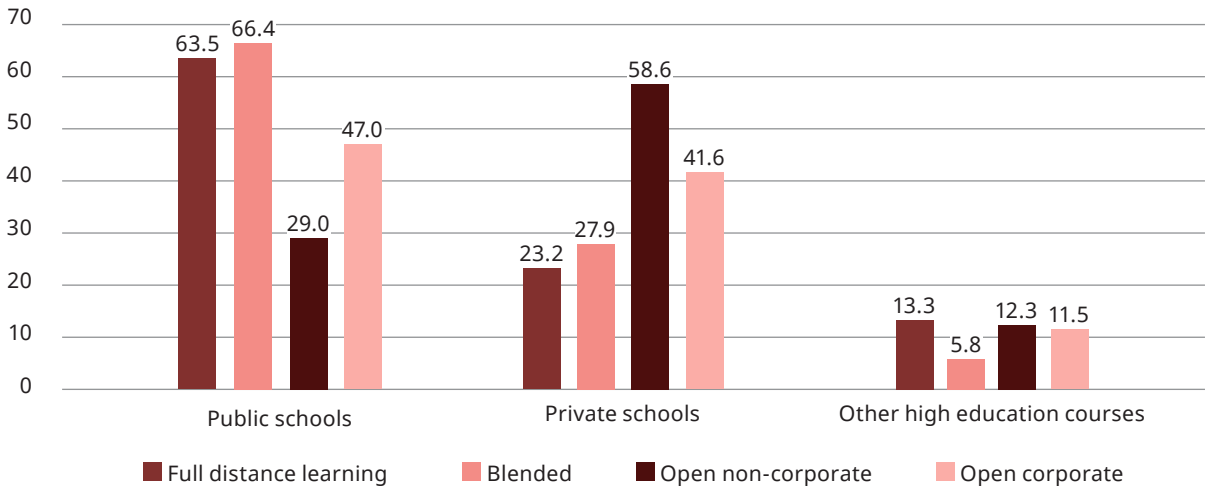
What is observed, in short, is that the distance modality is not discredited by any specific social class (perhaps class A, but this class has low representation in the general population as well), but accredited DL courses have a greater proportion of students who suffer from financial limitations to study.

7.3 School of origin

One fact that is related to the social class of the students is their school of origin, whether public or private basic education, or some other higher education institution. Unsurprisingly, the majority of students attending

accredited DL or blended courses come from public schools (between 63% and 66%). In corporate courses, the discrepancy is not so great, but the number is still higher, since there are more students from public schools in the general population.

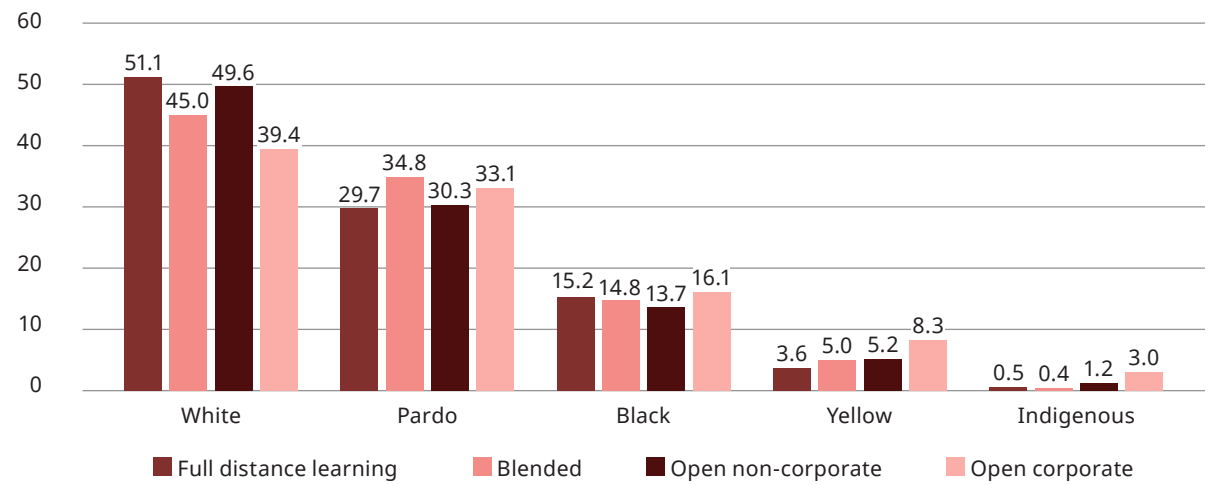
Chart 7.3 – Profile of distance learning students by school of origin, in percentage



7.4 Race/color

Regarding the race and color criteria, we observed a predominance of whites in all modalities of courses.

Chart 7.4 – Profile of distance learning students by race/color, in percentage



By way of comparison, although the data and methodology are not exactly comparable, it is worth noting that INEP has already found a similar percentage of whites and pardos in Brazilian higher education in 2014 (Senkevics, 2017), and a proportion of about 1 to 5 between whites and blacks. As per the Census data, there are more white students than pardos, but the ratio between whites and blacks is 1 to 3.

If we compare the data of distance learning students with the data of the Brazilian Census of 2010, we will also see that the proportion of whites and yellows in distance learning is higher than that of the population in general, and that of blacks and pardos is smaller. The number of indigenous people seems relatively equivalent to the proportion of the country.

Table 7.2 – Ethnic groups according to 2010 Brazilian Census

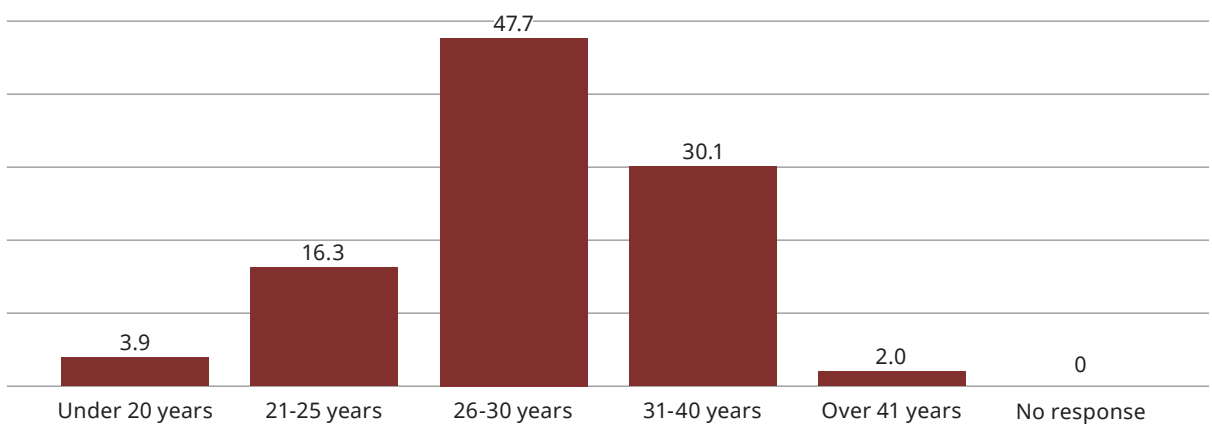
Ethnic groups	Percentage (%)
White	47.51
Pardo	43.42
Black	7.52
Yellow	1.1
Indigenous	0.42

Although the proportion of students of different races and colors in distance learning distinguishes between students from federal universities in the comparison between whites and blacks, but is still very different among whites and pardos, and although distance learning gives access to students from less favored social classes, the proportion of distance learning students is not yet equivalent to that of the Brazilian population.

7.5 Age

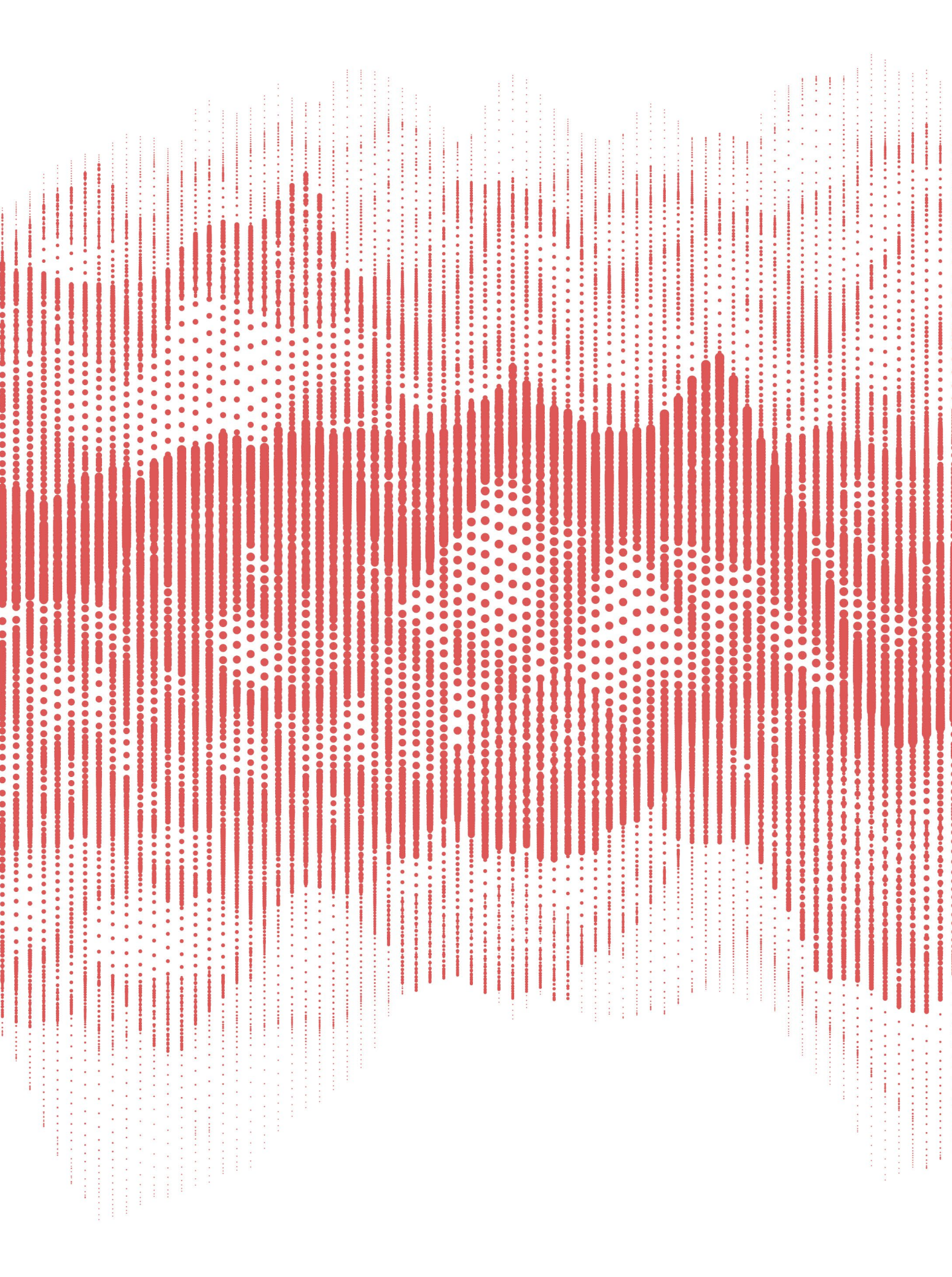
As for the age of students, we only collect information regarding accredited full DL courses. We had responses to this question from 159 institutions. The vast majority, 47.7%, has students of average age between 26 and 30 years, and 30% have students with average age between 31 and 40 years.

Chart 7.5 – Age range of students in accredited full distance learning courses, in percentage



Part 8

Educational resources available to students



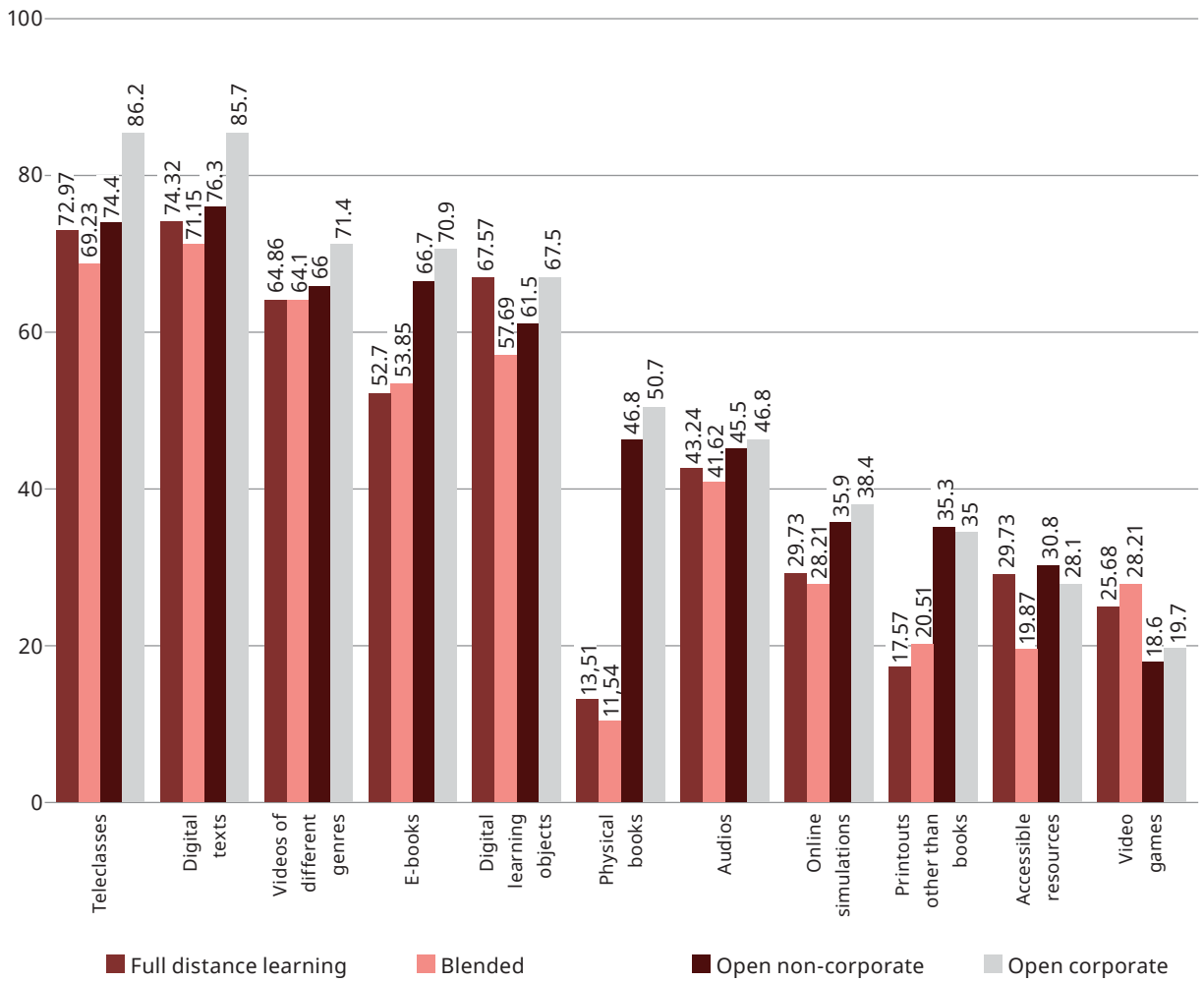
In this edition of the Census, we repeated the survey of educational resources offered to students in order to observe the learning resources that Brazilian distance learning (DL) students can count on. This analysis was carried out based on the responses of 351 educational institutions, 203 of which offer accredited full DL courses, 156 offer accredited blended courses, 156 offer open non-corporate courses and 74 offer open corporate courses.

In terms of content formats, we continue to see a very varied supply of resources. Teleclasses continue to lead the offer, used by 86.2% of institutions in accredited full DL courses. However, what is worth noting in this survey is the greater relevance, compared to previous years, of video games, adaptive resources, online simulations and digital learning objects. Traditional resources such as teleclasses and print and digital texts are not replaced, but there is a significant increase in the supply of technologically richer and more varied resources.

8.1 Content offer formats

See the following chart detailing the formats used by educational institutions to present their content to students.

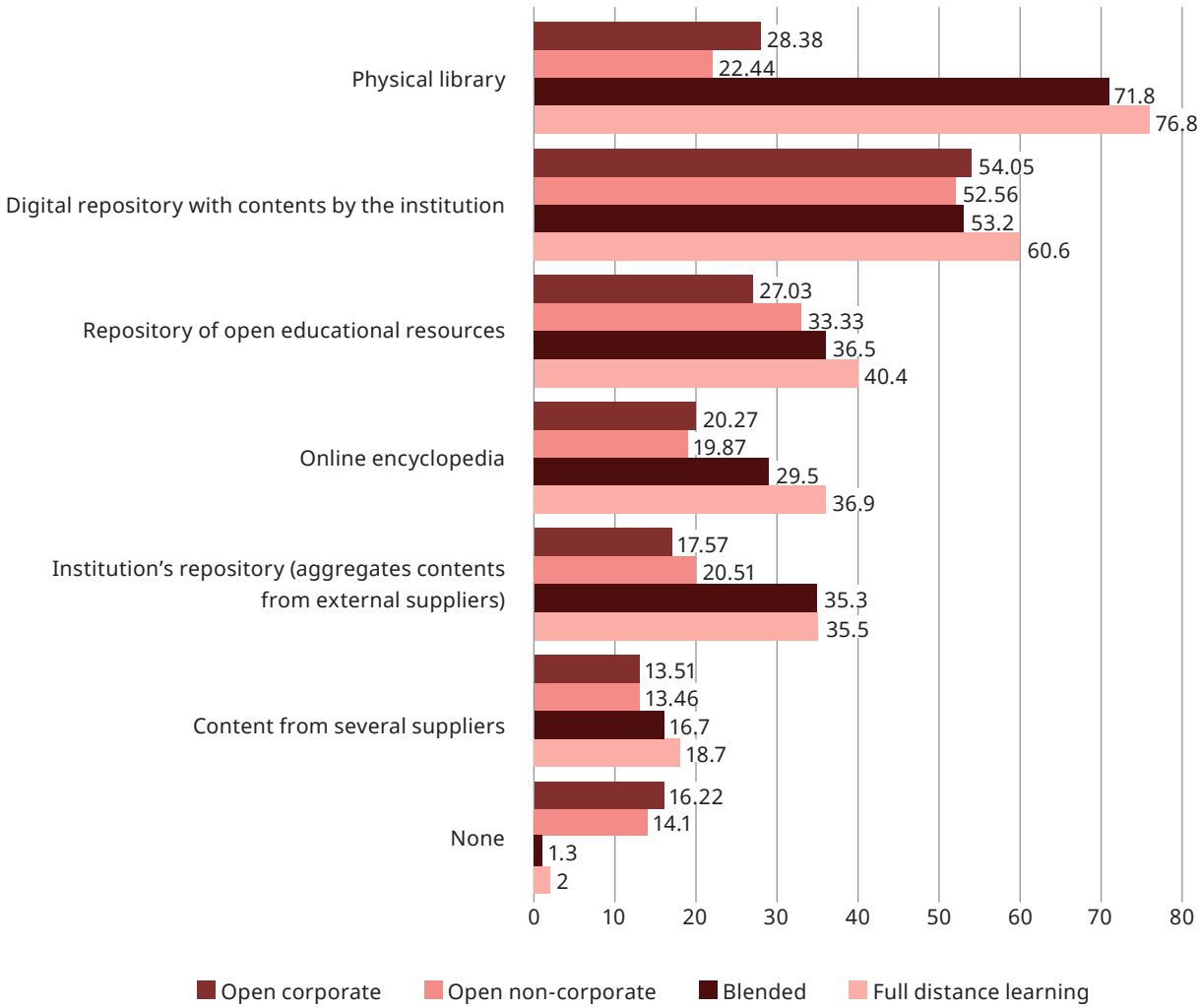
Chart 8.1 – Educational resources offered, in percentage of institutions



8.2 Content repositories

The analysis of the supply of content repositories is extremely interesting in 2017, since the new DL regulations no longer require a physical library. No reduction in the proportion of physical libraries was observed in institutions offering accredited full DL or blended courses. In fact, there was an increase: from 54% and 58%, respectively, in 2016 to 71% and 76%, respectively, in 2017. The number of institutions that do not offer any repository has been reduced to almost zero. In 2016, the numbers were between 4% and 6%. The offer of digital repositories has increased significantly in all categories, and there are already between 27% and 40% of institutions offering repositories of open educational resources, which were virtually non-existant in 2015.

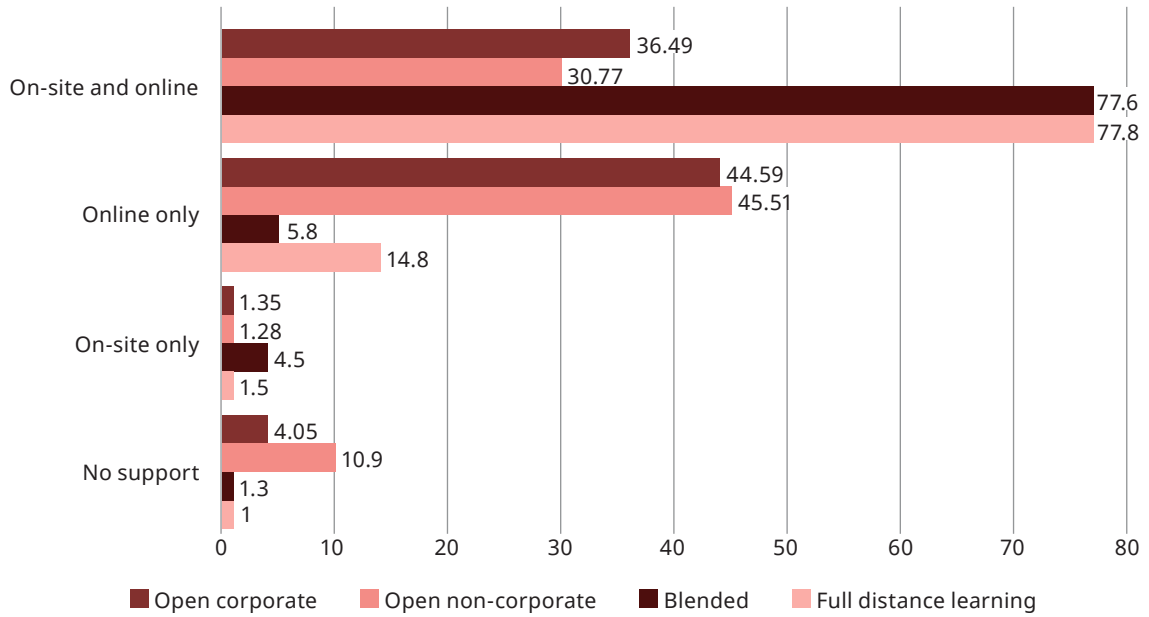
Chart 8.2 – Types of content repositories, in percentage of institutions



8.3 Support channels

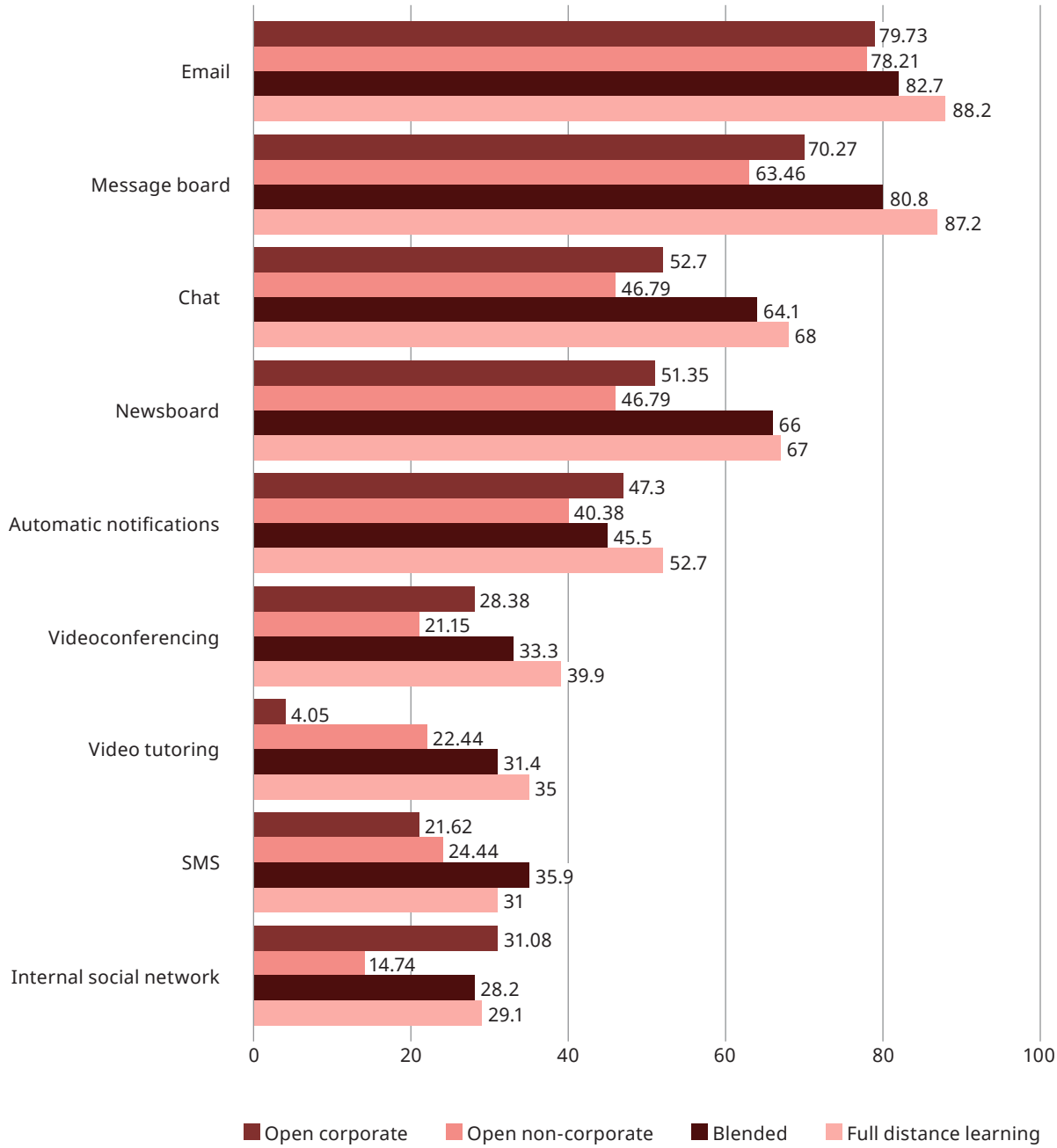
As for the support channels offered, only a few institutions do not offer any support to the students. This occurs in 10.9% of institutions offering open non-corporate courses. Exclusively on-site support is insignificant, with less than 2% of the institutions offering only this type of support in any type of course. The most common offer is that of both on-site and online support, present in approximately 77% of the institutions offering accredited full DL and blended courses, followed by online support only in approximately 45% of the institutions offering open courses.

Chart 8.3 – Types of student support, in percentage of institutions



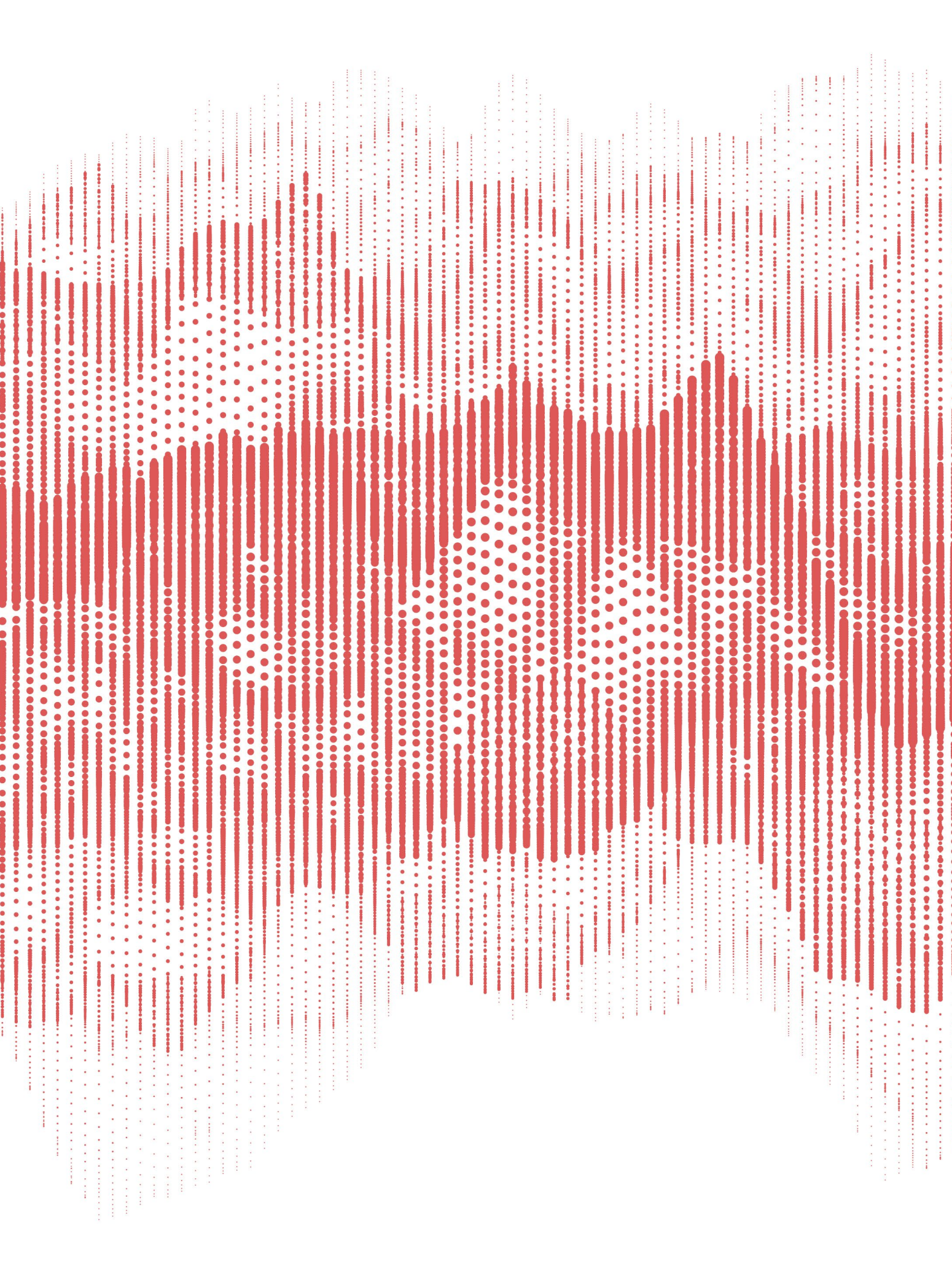
The most commonly used online support channels, as it happens with content, are the most traditional types of online support channels: email, forum and chat. It is worth mentioning, however, that channels that require more sophisticated technologies are being added to traditional ones in a significant way. In percentage of institutions offering these richer and/or more automated channels, we see a significant increase in newsboards, automatic notifications, videoconferencing, video tutoring and internal social networks. Evidently, Brazilian DL is investing in technology and automation, without giving up the well known traditional resources that brought it to its present moment of expansion.

Chart 8.4 – Channels for student support, in percentage of institutions



Part 9

State of business in distance learning



As in the last two years, the 2017 Census evaluated the situation of the distance learning (DL) business in Brazil. This analysis was carried out based on the responses of 341 educational institutions, 196 of which offer accredited full DL courses, 153 offer accredited blended courses, 150 offer open non-corporate courses, 72 offer open corporate courses and, for comparison purposes, 281 offer on-site courses.

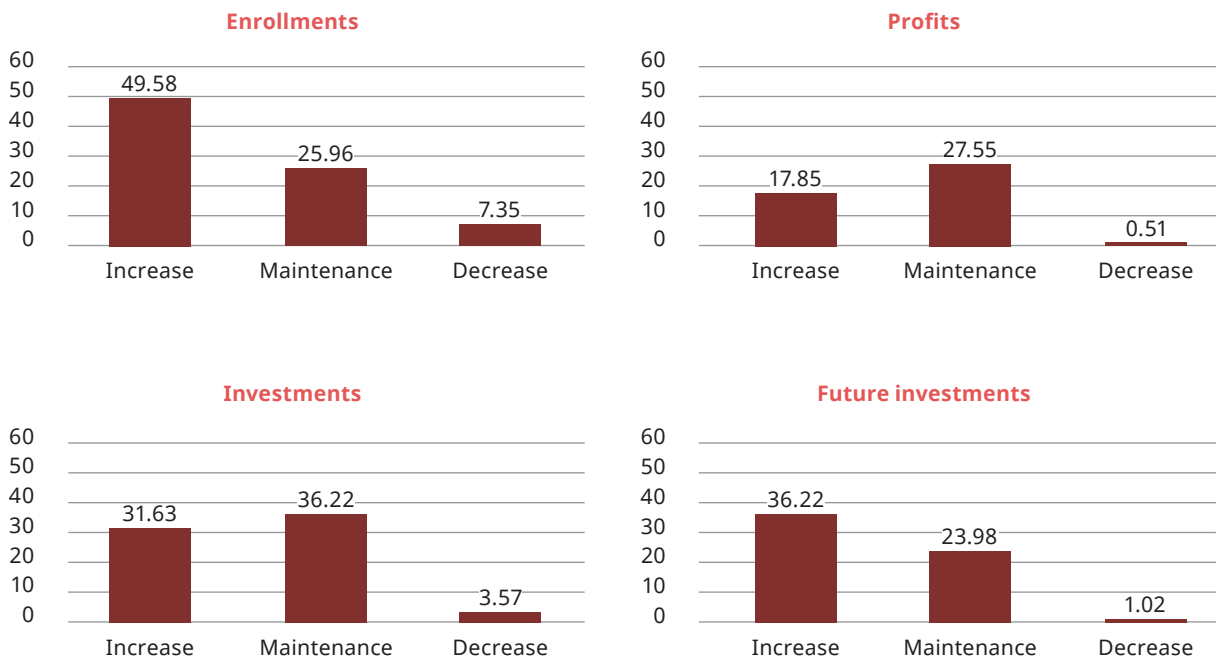
The following graphs show the percentage of institutions, by type of course, that increased, maintained or decreased their enrollments, profits and investments in 2017. We also present the percentage of institutions that stated they intend to increase, maintain or reduce investments in 2018. These charts allow us to infer where businesses are doing better or worse and which investments have generated the most returns.

In this section, we present graphs with the same data that indicate in which type of course there was an increase, maintenance or decrease in investments, enrollments, profits, and future investments.

9.1 Full distance learning courses

The data show that competition in accredited full DL courses is strong, and the number of students has increased significantly: 31% of the institutions have increased investments, and 49.58% have observed an increase in enrollments, but only 17% in profitability. Even so, 36% of institutions intend to expand their investments and participate in the competition for this growing student market. There were 3.57% of institutions that lost students, but practically none lost profitability in the full DL modality.

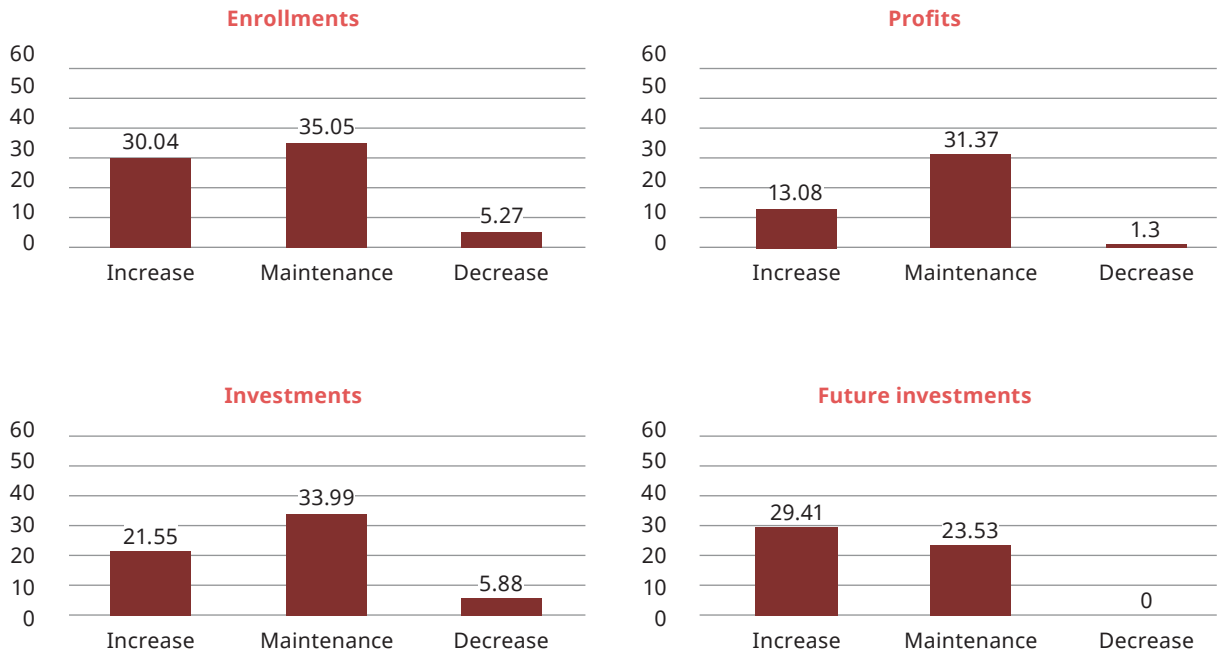
Chart 9.1 – Comparison of enrollments, profits, investments and future investments in accredited full DL courses



9.2 Blended courses

Among institutions that offer blended courses, 21% increased their investments in this market, 30% observed an increase in enrollments and 13% observed an increase in profits. Only 1.3% of these institutions observed a decrease in profits, and 5.88% had reduced their investments. For the following year, 29% of institutions are planning to increase investments in blended courses.

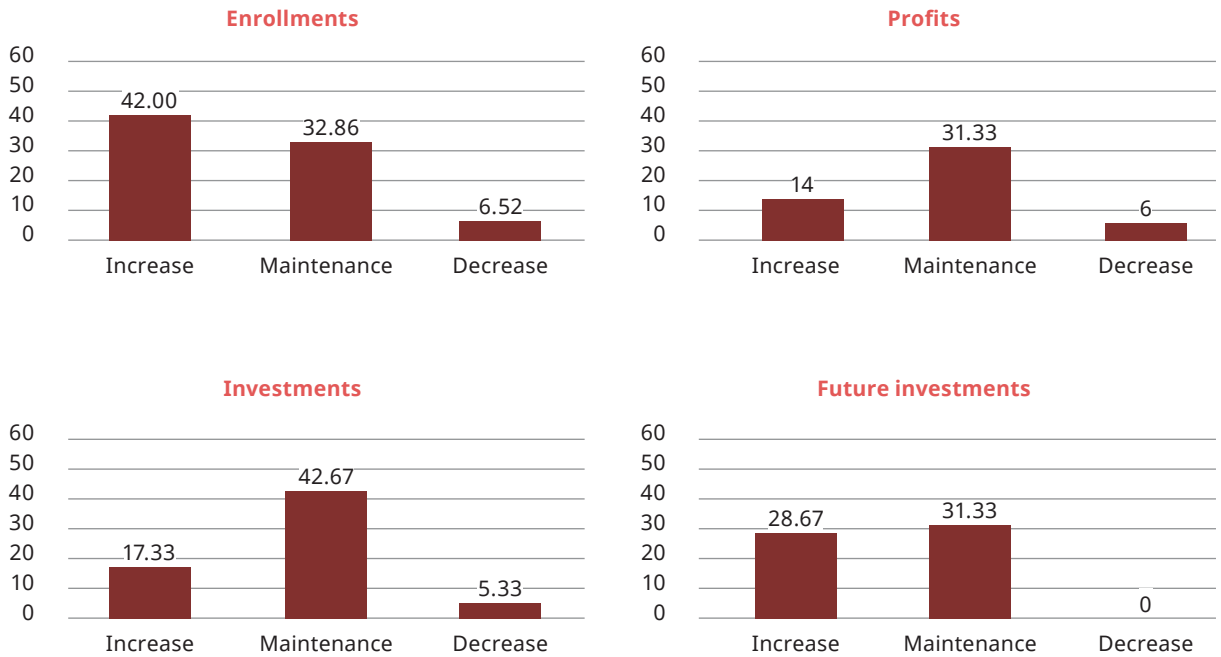
Chart 9.2 – Comparison of enrollments, profits, investments and future investments in accredited blended courses



9.3 Open non-corporate courses

Compared to the blended courses, there were not so many institutions that invested in open non-corporate courses. Only 17.3% increased investments in this modality in 2017. But the results were very significant: 42% of institutions had an increase in the number of enrollments and 14% had an increase in profits. The market seems willing to bet on open non-corporate courses in 2018. We observed that 28.67% of institutions state that they will increase investments in this type of course.

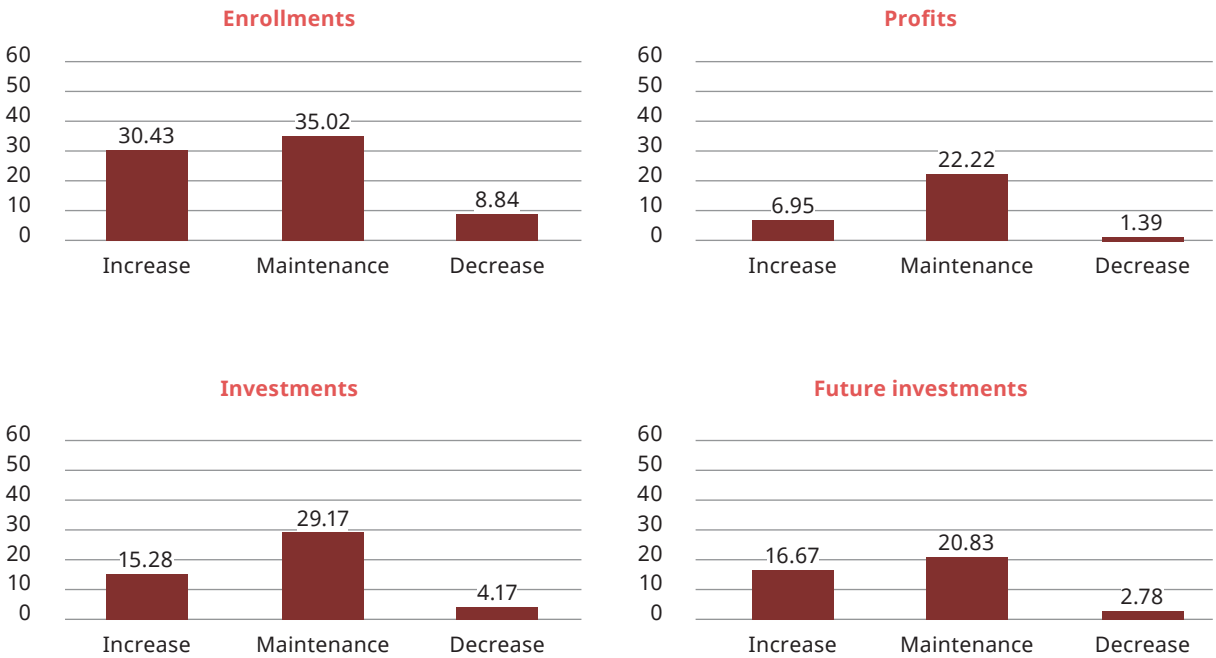
Chart 9.3 – Comparison of enrollments, profits, investments and future investments in open non-corporate courses



9.4 Open corporate courses

There was an increase in the number of students in 30.43% of the institutions offering free corporate courses, but we also observed a reduction in 8.84% in institutions. We see that 15.28% of institutions increased their investments in this type of course and only 6.95% had an increase in profits. There is no prospect of increased investments in this type of course. Only 16.67%, a number very similar to 2017, intends to increase its investments.

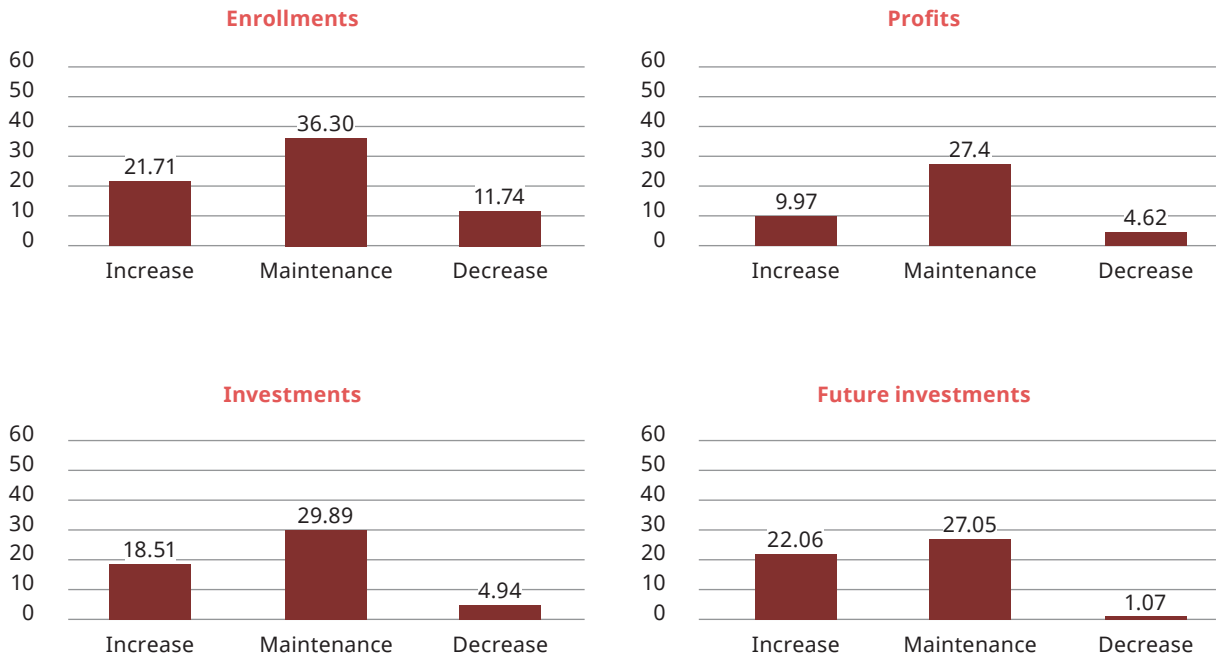
Chart 9.4 – Comparison of enrollments, profits, investments and future investments in open corporate courses



9.5 On-site courses

On-site courses visibly suffered in 2017. We observed that 18.51% of institutions increased investments, and 21.71% had an increase in the number of students, while 11.74% lost students. In terms of profitability, only 9.97% had an increase in profits and 4.62% had losses. Even so, there are more institutions that intend to increase investments in this modality (22%) for the next year than there was in the last Census.

Chart 9.5 – Comparison of enrollments, profits, investments and future investments in on-site courses



9.6 Enrollments

The increase in the number of enrollments was more marked in accredited full DL courses (49.58% of institutions observed an increase in enrollment), followed by open non-corporate courses, with 42% of institutions observing an increase in their number of students. Now, among courses that had a loss in the number of students, the on-site modality lost the most, with 11.74% of the institutions reporting having lost students.

Chart 9.6 – Percentage of institutions that observed an increase in the number of enrollments, by type of course

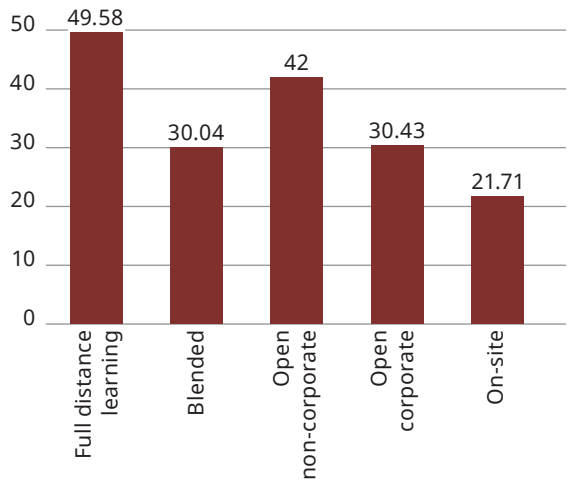


Chart 9.7 – Percentage of institutions that observed maintenance in the number of enrollments, by type of course

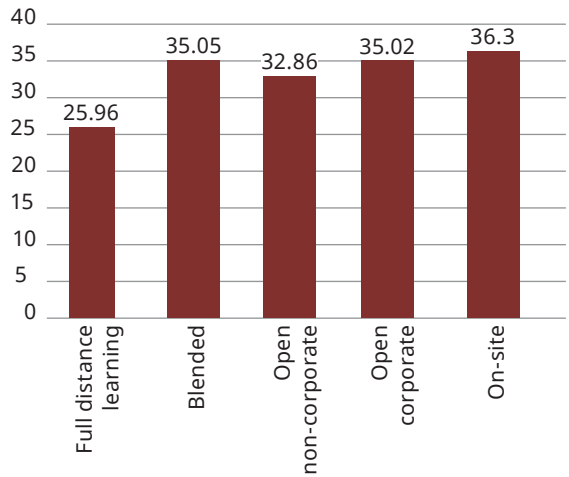
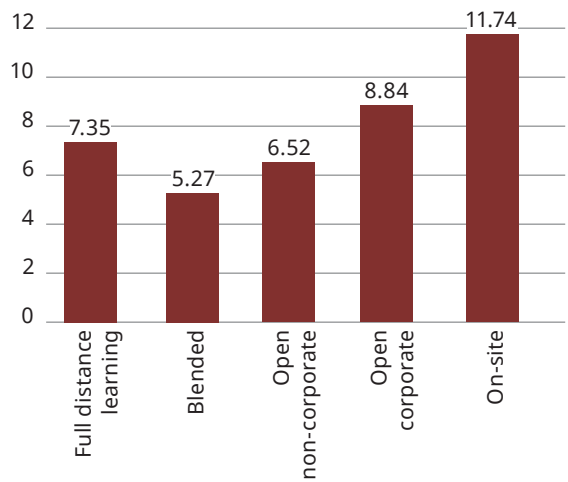


Chart 9.8 – Percentage of institutions that observed a decrease in the number of enrollments, by type of course



9.7 Profitability

Noting the profitability of DL only, accredited full DL courses and open non-corporate courses were the ones with the highest increase in profits, with 17.85% and 14%, respectively. However, among institutions with decreased profits, 6% indicated losses in open non-corporate courses and 4.62% in on-site courses. This indicates that there were profitable and unprofitable open courses and the market still needs to better understand this modality.

The loss of profitability of non-corporate free courses may also be due to the reduction in investments, which was also higher than in other types of courses, as the following charts show.

Chart 9.9 – Percentage of institutions that observed an increase in profits, by type of course

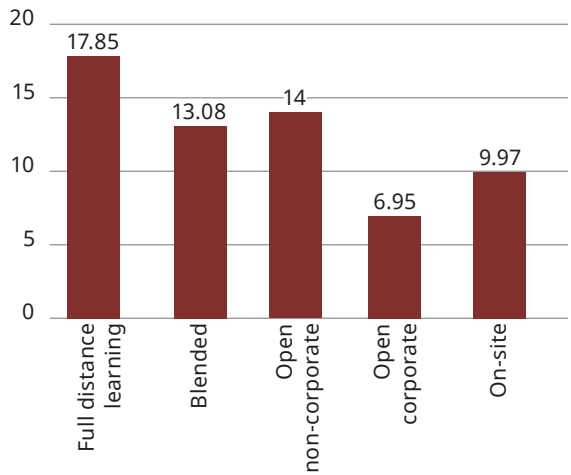


Chart 9.10 – Percentage of institutions that observed maintenance in profits, by type of course

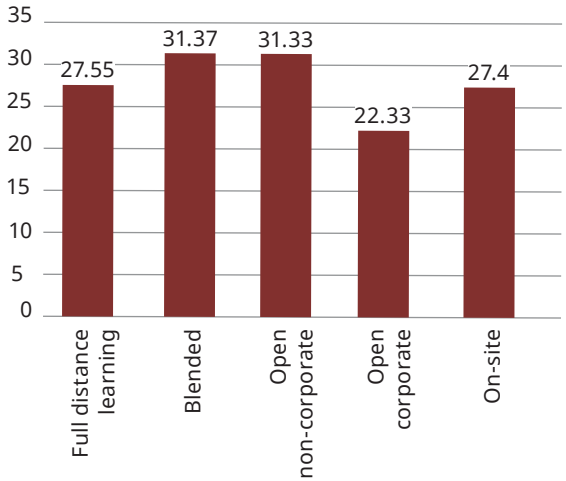
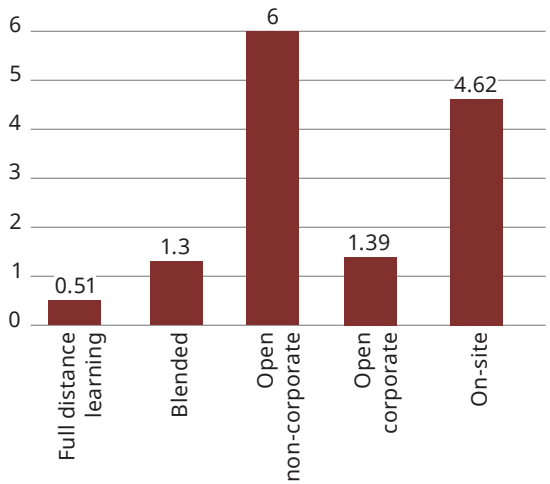


Chart 9.11 – Percentage of institutions that observed a decrease in profits, by type of course



9.8 Investments

In terms of investments made in 2017, we observed that full DL regulated courses were the ones with the highest increase (31.63% of institutions), followed by semi-resources (21.57% of institutions increased investments in this modality).

Among the institutions that reduced investments, full DL regulated courses were also the least affected: only 3.57%.

Chart 9.12 – Percentage of institutions that increased investments in 2017, by type of course

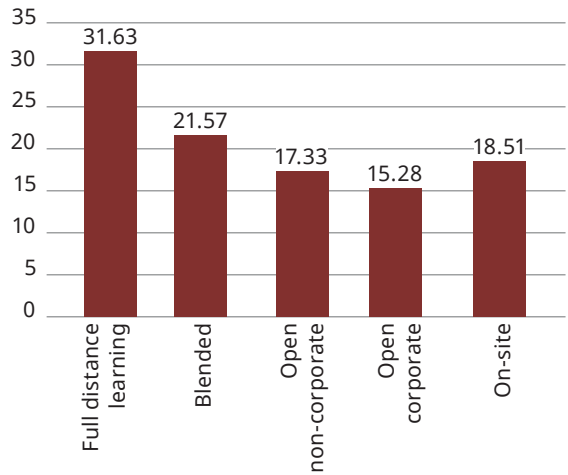


Chart 9.13 – Percentage of institutions that maintained investments in 2017, by type of course

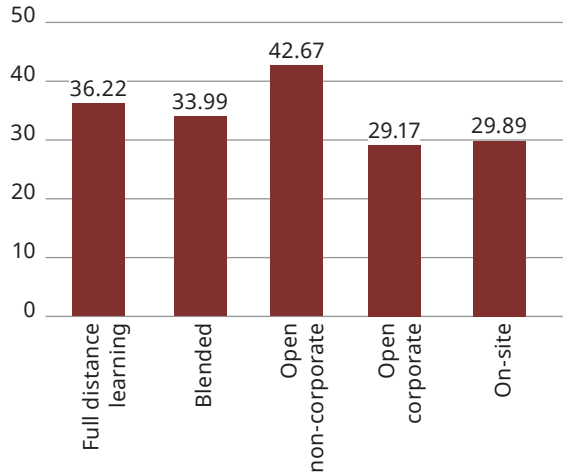
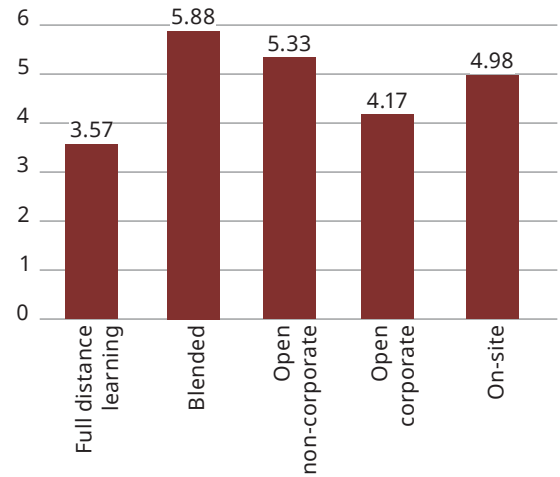


Chart 9.14 – Percentage of institutions that reduced investments in 2017, by type of course



9.9 Future investments

Confidence in the future is evidently falling on accredited full DL courses, with 36.22% of institutions reporting that they will increase their investments in this modality. These are followed by blended and open non-corporate courses, with approximately 29% of the institutions intending to increase investments in these modalities. Open corporate courses are inspiring the least confidence to make investments. Only 16% of institutions intend to invest in them and 2.78% intend to reduce investments in this type of course.

Chart 9.15 – Percentage of institutions that intend to increase investments in 2018, by type of course

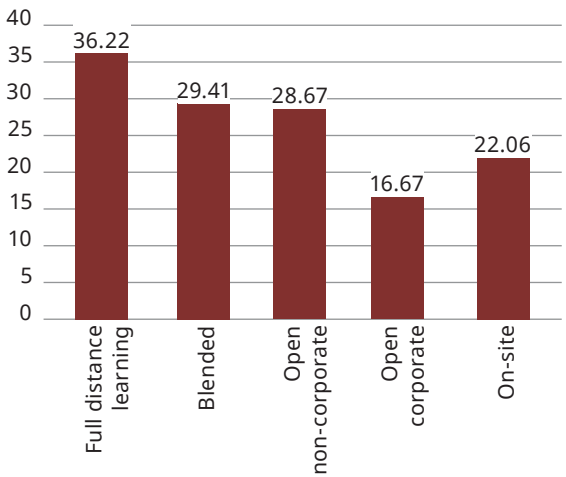


Chart 9.16 – Percentage of institutions that intend to maintain investments in 2018, by type of course

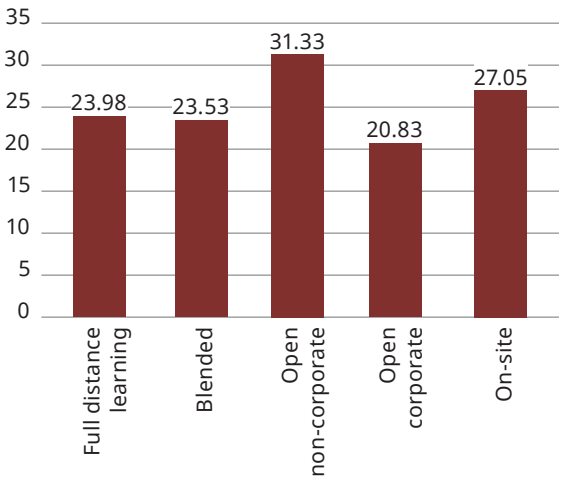
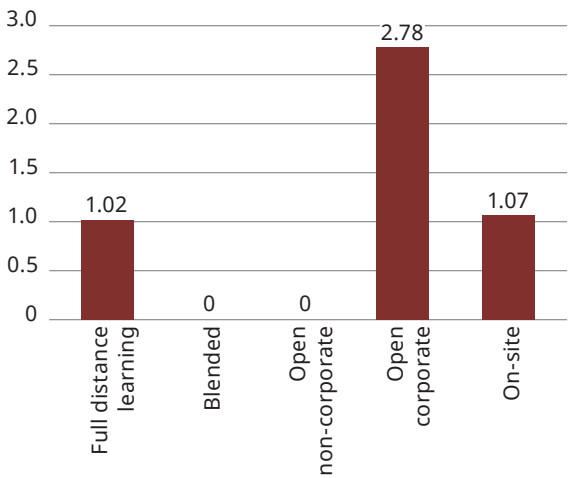
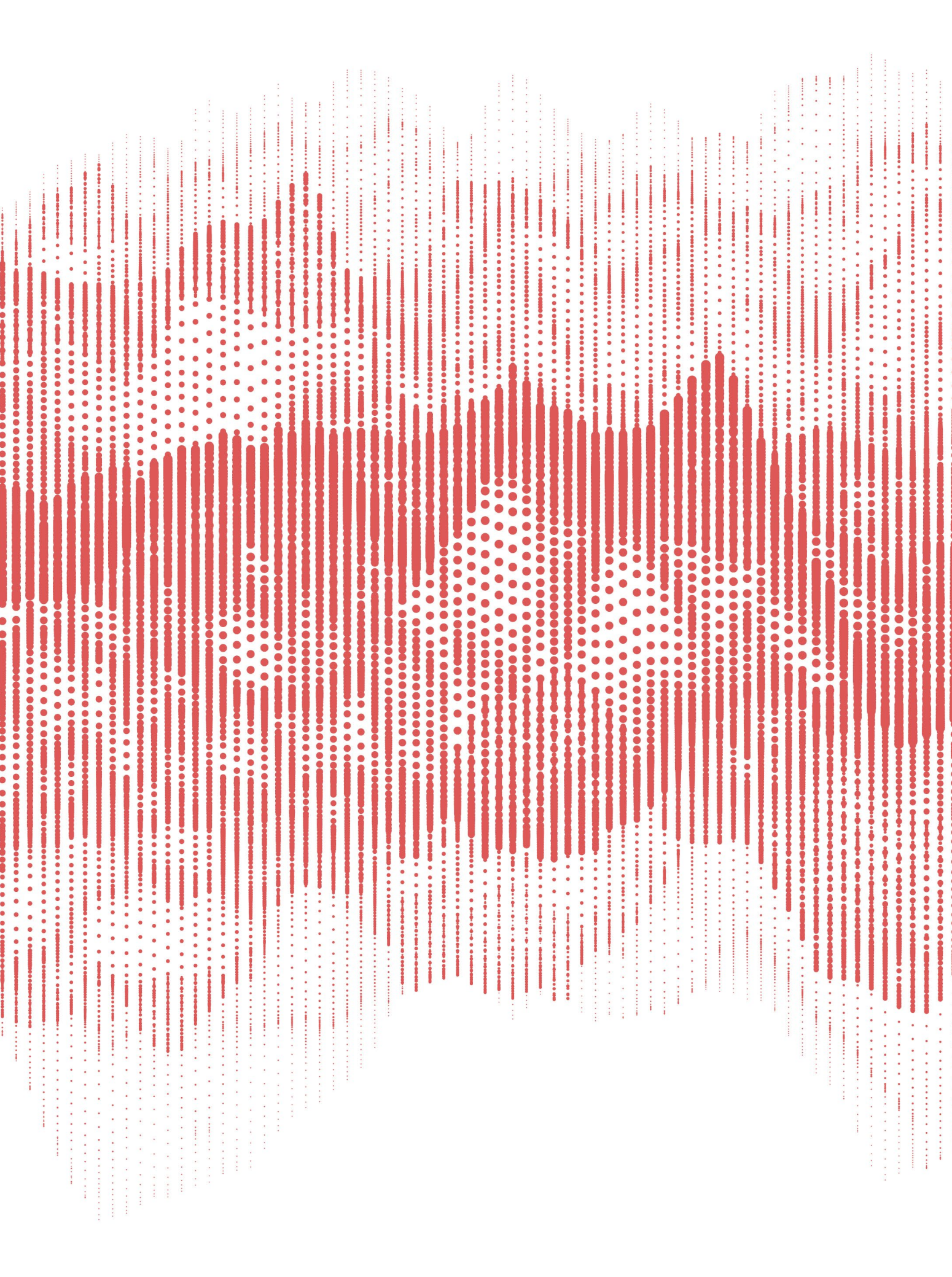


Chart 9.17 – Percentage of institutions that intend to reduce investments in 2018, by type of course



Part 10

Accessibility survey results



This chapter of the 2017 Census was based on an individual questionnaire sent to the database of respondents during the month of June, after the data from the main questionnaire were computed. We have received specialized assistance on this theme from Karina Tomelin and Tatiana Santos.

10.1 Profile of the sample

The questionnaire on accessibility was answered by 37 higher education institutions offering accredited full distance learning (DL) courses. The main questionnaire was answered by 196 institutions.

It is worth noting that the main questionnaire has participants from all states of the federation, as well as the Federal District, and the accessibility questionnaire was answered by institutions in 11 states, as we see below.

10.1.1 Respondents' headquarters

Proportionally, the state of Paraná stood out in the responses to the Accessibility Census. In this stage of the Census, 29.73% of the sample is from this state, which accounts for 8.2% of the general sample. The other Sourhtern states are also well represented among those that answered the Accessibility Census: Rio Grande do Sul makes up 8.2% of the general sample and 16.2% of the accessibility sample, and Santa Catarina represents 7.6% of the general sample and 8.1% of the accessibility sample.

Chart 10.1 – Number of institutions that answered the Accessibility Census, by state

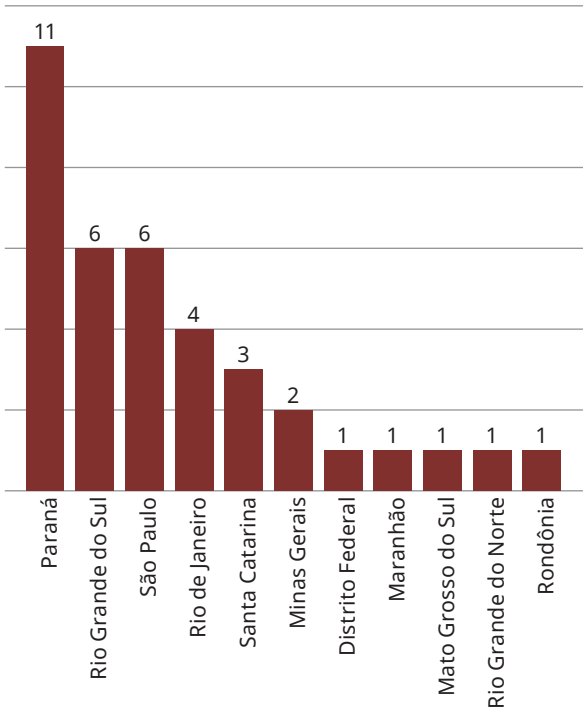
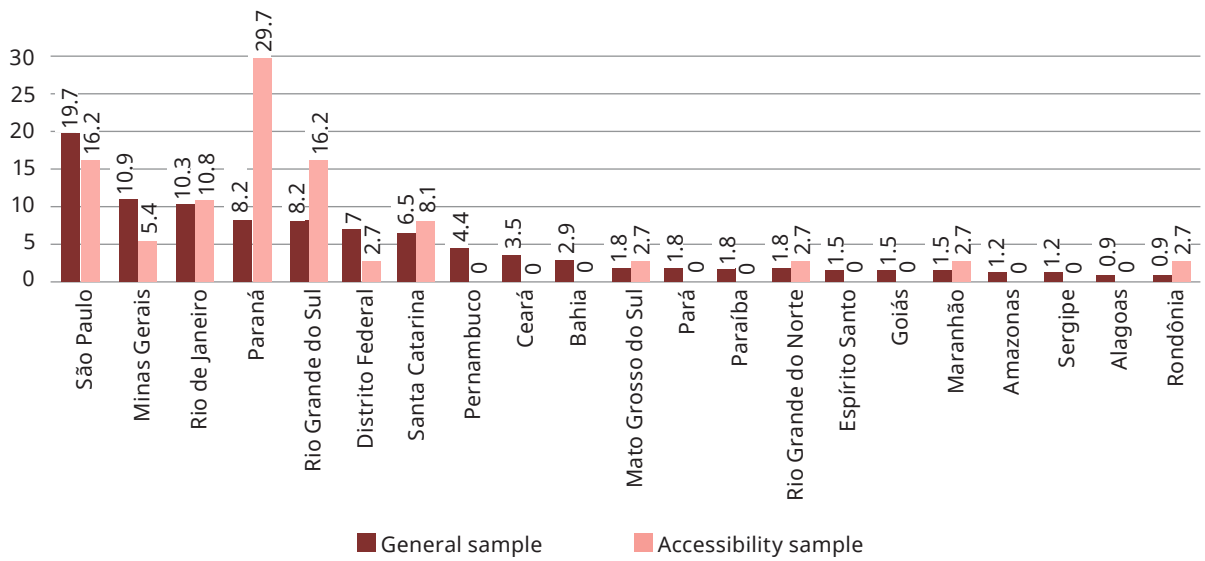


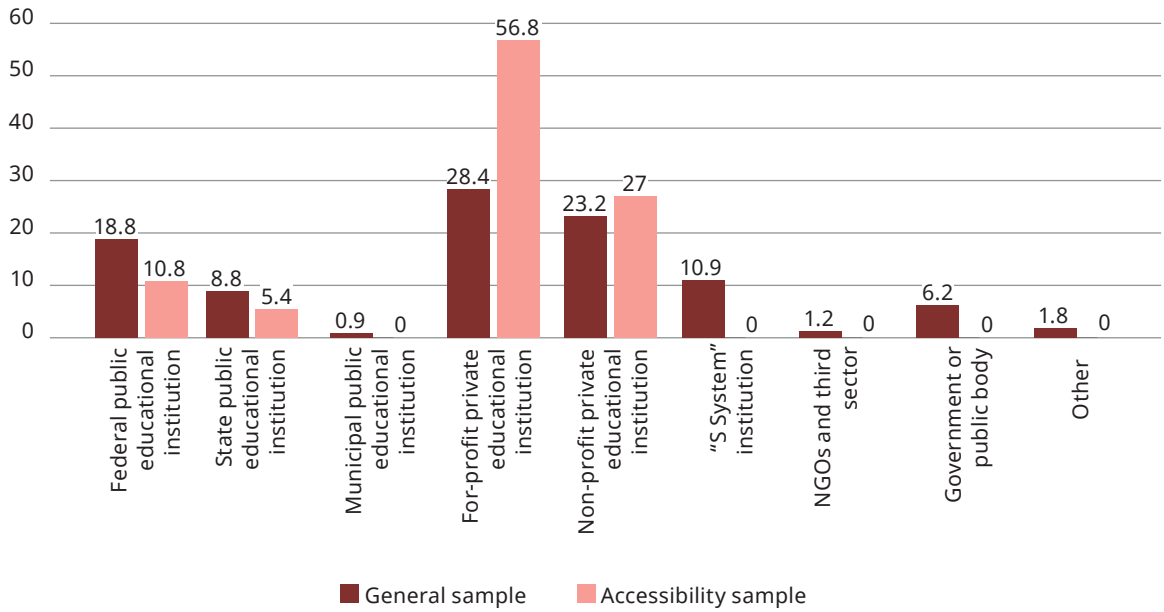
Chart 10.2 – General sample and accessibility sample, by state, in percentage



10.1.2 Administrative categories

In terms of representation among the different administrative categories, we see that for-profit and non-profit private institutions have a higher presence in the accessibility sample than the others. For-profit private institutions make up 28.4% of the general sample and 56.8% of the accessibility sample.

Chart 10.3 – General sample and accessibility sample, by administrative category, in percentage

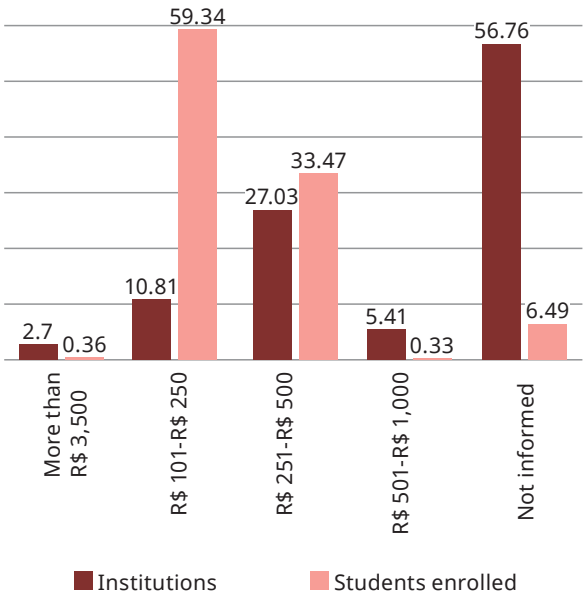


10.1.3 Number of students

The INEP 2017 School Sample records 38,272 students with special needs enrolled in higher education, both on-site and in distance learning. The accessibility sample of the Census counted 3,313 students in the target audience of special education, served by 37 institutions. Therefore, we are working with a significant sample, which represents the reality of approximately 10% of special needs students in higher education. Distance learning certainly has a relevant contribution in that field.[1]

1 To clarify, the INEP School Census refers to this public as special needs, a term that is previous to the National Policy for Special Education from the Perspective of Inclusive Education. However, throughout this text, we chose to use the name that defines this audience based on this policy: target audience of special education. This term encompasses students with disabilities, global development disorders and high skills/gifting.

Chart 10.4 – Prices charged for special education, in percentage of institutions

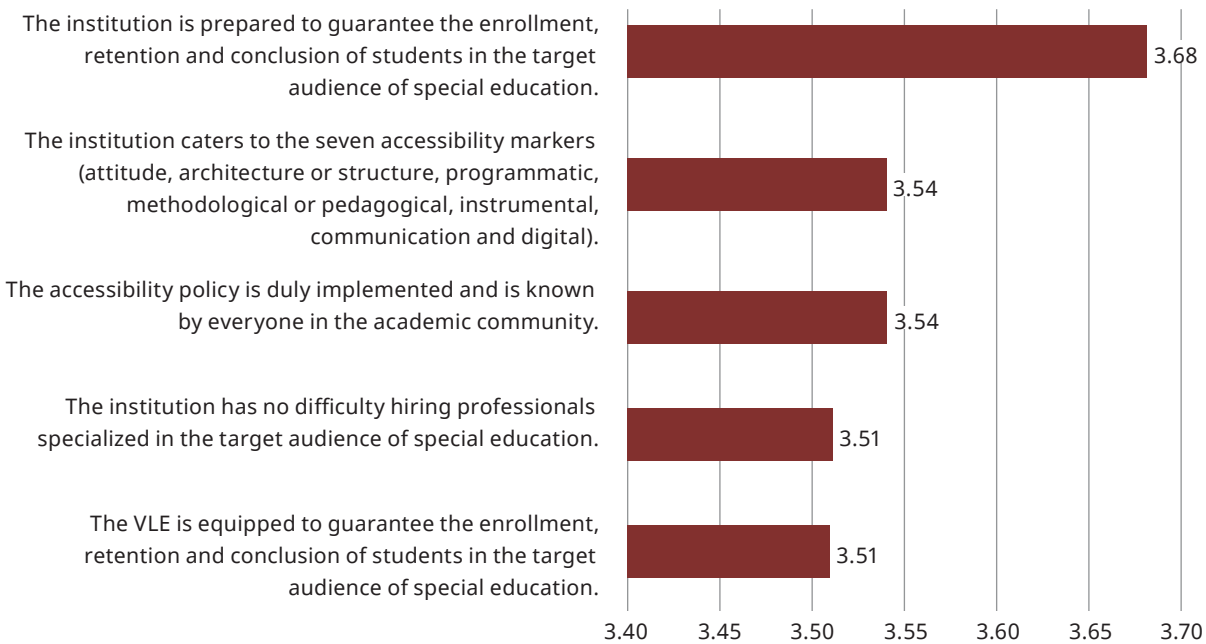


In addition to distance learning significantly contributing to serve students in the target audience of special education in the country, and although there is still room to grow and we do not have respondents in every state, we have also that these institutions are not the most expensive. In our sample, among the institutions participating in the Census, 10% charge between R$ 101 and R$ 250 and serve 59.34% of special education students. The 27% of the sample that charge from R$ 251 to R$ 500 serve 33.57% of students. And institutions that reported charging R$ 501 to R$ 1,000, which account for 5.41% of the sample, serve 0.33% of students.

10.2 Target audience of special education

When asked about their opinion on how they are catering to the target audience of special education, in a 1-5 Likert scale where 1 is the lowest agreement and 5 is the highest, institutions are still relatively disagreeing regarding how prepared they are to serve this audience. The average agreement for the general question is 3.68, while specific responses on the accessibility spectrum served, implementation of the accessibility policy, hiring staff and VLE accessibility resources vary from 3.54 to 3.51.

Chart 10.5 – Opinion of educational institutions regarding support to special education, in 1 to 5 Likert scale

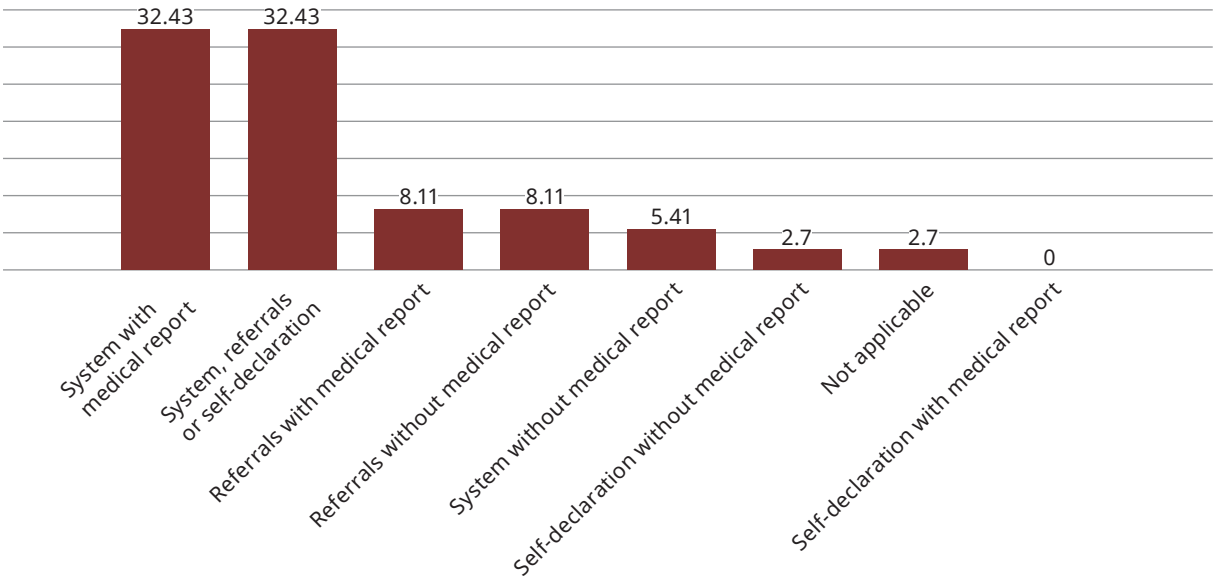


10.2.1 How they are identified

Regarding how institutions identify the target audience of special education, most (32.43%) identify students through their system, student self-declaration or referrals, and required proof by medical report is still a recurring practice among 8.11% of institutions.

Thus, identification in higher education depends mostly on the student's initiative to communicate the institution and request resources. However, as acceptance is still a factor of complication in this regard, many cases are detected by tutors and teachers, whether in on-site encounters, interactions via chat or message board or correcting activities. The lack of a specific field to report this information in university systems can also interfere in identifying this audience.

Chart 10.6 – How institutions identify the target audience of special education, in percentage



As proof by medical report is still used, it is worth noting Technical Norm n. 4 (Brasil, 2014), which assures:

> the presentation of a medical report (clinical diagnosis) by students with disabilities, global developmental disorders or highly skilled/gifted students can not be a requirement, since SES is characterized by pedagogical, not clinical, care.

On the other hand, the Brazilian Inclusion Law (Brasil, 2015, own translation), when referring to accessibility in standardized testing and other academic activities, says: "time extension, according to the demand presented by the disabled candidate, both in selection exams and in the academic activities, upon previous request and proof of need.".

10.2.2 What institutions map

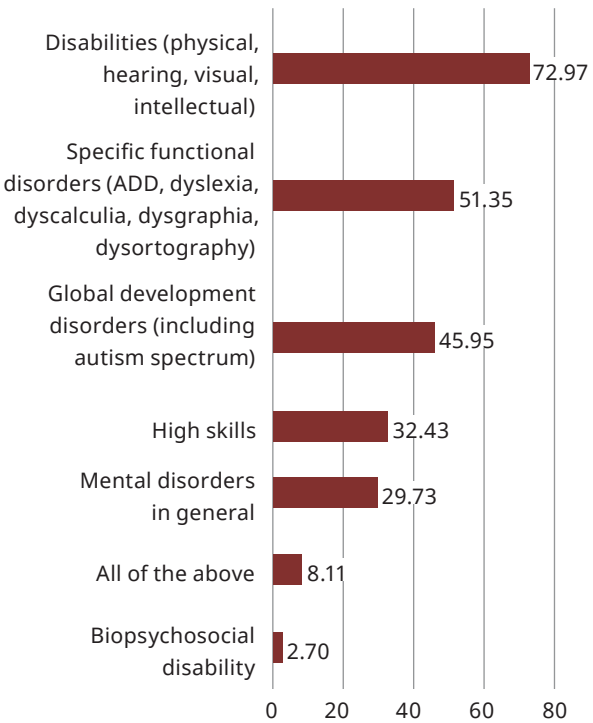
In Brazil, according to the 2010 Demographic Census (IBGE, 2010), 46.5 million people declared some kind of visual, motor, hearing or intellectual disability, as well as their severity. In higher education, as per the 2017 Brazilian Census for Distance Learning, the number of enrollments in the target audience of special education in on-site and distance learning courses was 38,272. Students were identified with blindness, low vision, deafness, hearing impairment, physical disability, deaf-blindness, multiple disabilities, intellectual disability, childhood autism, Asperger's syndrome, Rett syndrome, childhood disintegrative disorder and giftedness.

In five years, the increase of this audience in higher education was 11,129 students, that is, 29.08%.

Understanding the profile of the target audience of special education in higher education institutions gives us an overview of who is the student who needs support in distance learning. The 2008 National Policy for Special Education from the Perspective of Inclusive Education considers a target audience of special education those who "have long-term physical, mental or sensory impairments which, in interaction with various barriers, may be restricted of their full and effective participation in school and society" (Brasil, 2008, p. 9).

Besides, the Policy mentions students with global development disorders, which includes students with autism, autism spectrum syndrome and childhood psychosis, as well as highly skilled and gifted students. Specific functional disorders (ADD, dyslexia, dyscalculia, dysgraphia, dysortography) are not considered target audience of special education, however, they must receive pedagogical support oriented by this field.

Chart 10.7 – Special needs mapped, in percentage



The Brazilian Census for Distance Learning shows that, among the specificities mapped by the institutions, most refers to disabled students, followed by specific functional disorders. It is worth noting that, although these disorders are not mapped by the INEP Higher Education Census (INEP, 2018), they represent a significant share reported by institutions. Besides, mental disorders, which appear so little in the Policy and the Higher Education Census, are then mapped and identified, most probably due to the need to support this student profile.

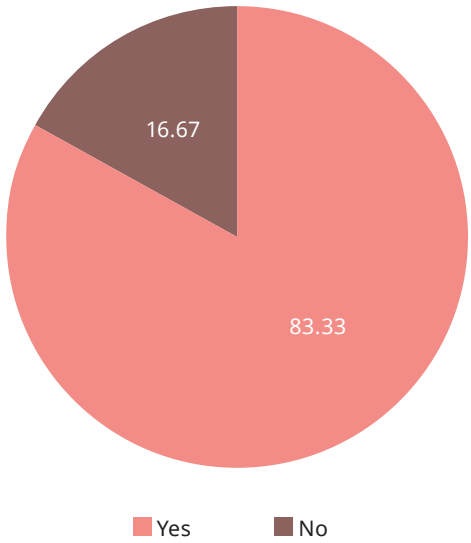
10.3 What institutions offer

If we understand that special education in higher education must work in conjunction with the psychopedagogical support offered by institutions, the high number of students with disabilities, disorders and high skills requires specific accessibility resources.

10.3.1 Specialized area

The specificities of attending to these students require the institution to created differentiated areas that are specialized in supporting this audience. In the survey, most institutions report having a dedicated support area for these students. The Census did not aim to learn about the profile of professionals in this area, although other works reveal that many are teachers of the institution, psychologists, psychopedagogue or multidisciplinary teams (Tomelin et al., 2018).

Chart 10.8 – Existence of a specialized area for special education, in percentage

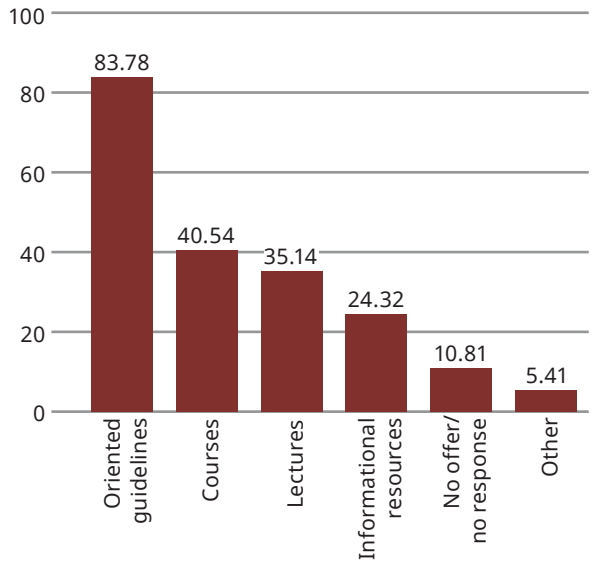


It is worth noting that there are many professionals described in the law as apt to work with accessibility resources. Specialized educational support (SES) destined to the target audience of special education, according to the National Policy for Special Education from the Perspective of Inclusive Education and the Brazilian Inclusion Law (Brasil, 2015) must be carried out by the special education professional. These guidelines also mention specialists that help in accessibility, such as Brazilian Sign Language (Libras) interpreters and orofacial articulators, as well as audio describers and caretakers.

10.3.2 Professional training

The Brazilian Census for Distance Learning revealed that 83.78% of institutions offer education to their professionals through oriented guidelines, 40.54% through courses and 35.14% through lectures. This figure is relevant as few teachers are prepared to handle disabled students.

Chart 10.9 – How institutions train special education professionals, in percentage

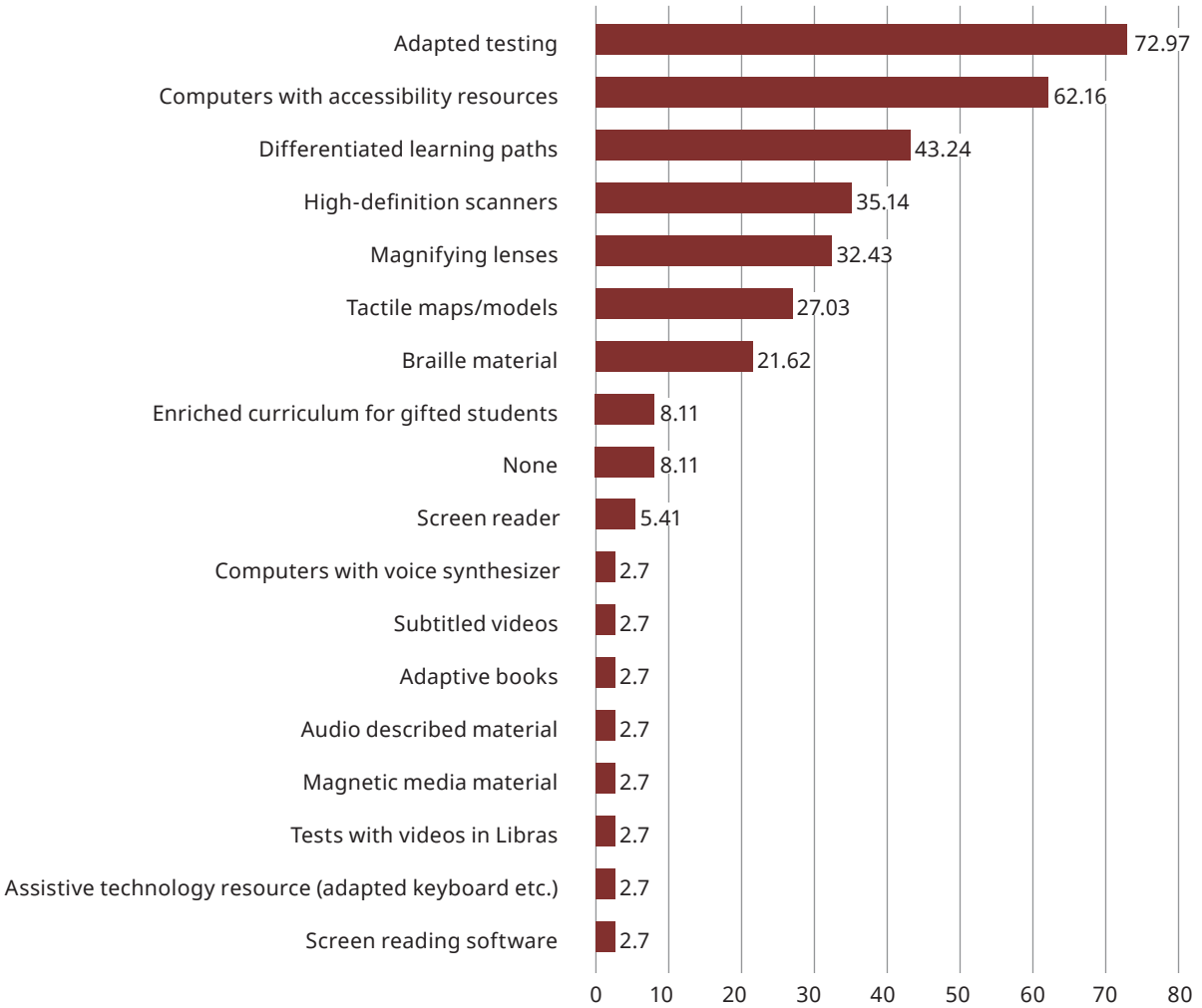


Guiding and offering subsidies so that teachers know how to act, interacting with these students and applying evaluations, for example, becomes essential. Oriented guidelines mentioned by most institutions are also effective, as each student, within their disability, has specific needs.

10.3.3 Tech resources

In higher education, according to the Policy, "special education is effective through actions that promote students' access, retention and participation" (Brasil, 2008, p. 12, own translation). These actions think of accessibility under different dimensions, such as communications, information systems and learning materials.

Chart 10.10 – How institutions identify the target audience of special education, in percentage

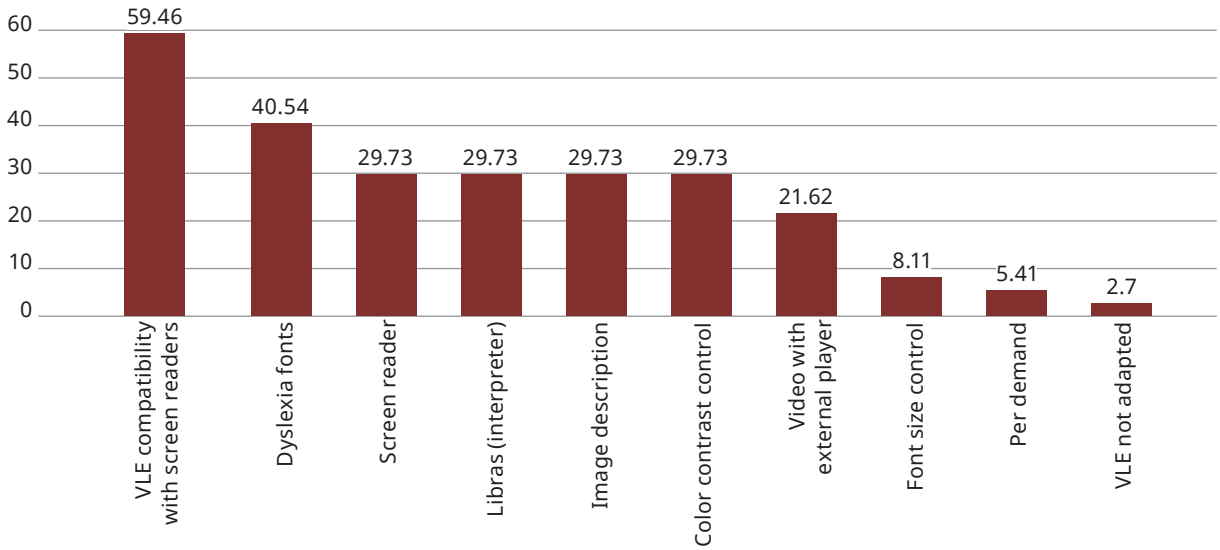


The Brazilian Census for Distance Learning has shown that one of the most common resources available to the target audience of special education is adapted testing. It is very likely that adaptations of tests involve enlargement, compatibility with screen readers and text to image converting, for example, since 10,619 students mapped by the 2017 Census have low vision. This is the second most common condition reported among enrolled students, only behind physical disabilities, with 14,449.

Another resource reported were computers with accessibility resources. Currently, the market offers many options of software and apps that help access learning materials and VLEs.

10.3.4 VLE resources

Chart 10.11 – Resources offered in the VLE, in percentage



The Census revealed that institutions use several accessibility resources in the VLE. 29% report that the VLE is compatible with screen readers, 40% use dyslexia fonts, and 29% use screen readers. Next, we see the use of Libras, image description and color contrast controls.

It is worth clarifying that, with the advance in technology, screen readers present a great option for people with vision disabilities, as is allows the conversion of text into audio, replacing Braille printing.

Most resources mentioned, except for the VLE or the Libras window in videos, involves the accessibility of visually impaired students.

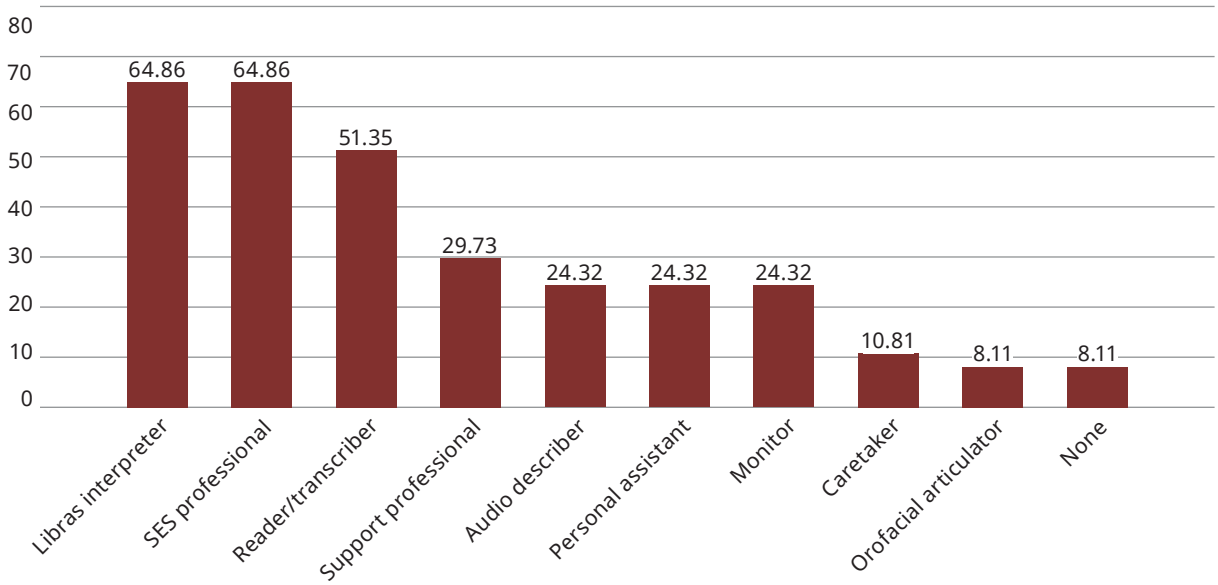
The response “Per demand”, chosen by 5.41% of participants, draws our attention. Considering that the adaptation of a VLE requires customization and development by the IT team, waiting for the demand doesn’t guarantee that the student will be contemplated, as the environment is not yet ready for them.

Similarly, admitting that the VLE is not adapted, as did 2.70% of participants, guarantees that distance learning is not accessible in that institution.

10.3.5 Human support

Hiring professionals, according to the law, is under the responsibility of the institution. The Census observed that most participants (65%) mentioned hiring Libras interpreters and SES professionals to cater to the target audience of special education.

Chart 10.12 – Human support offered, in percentage



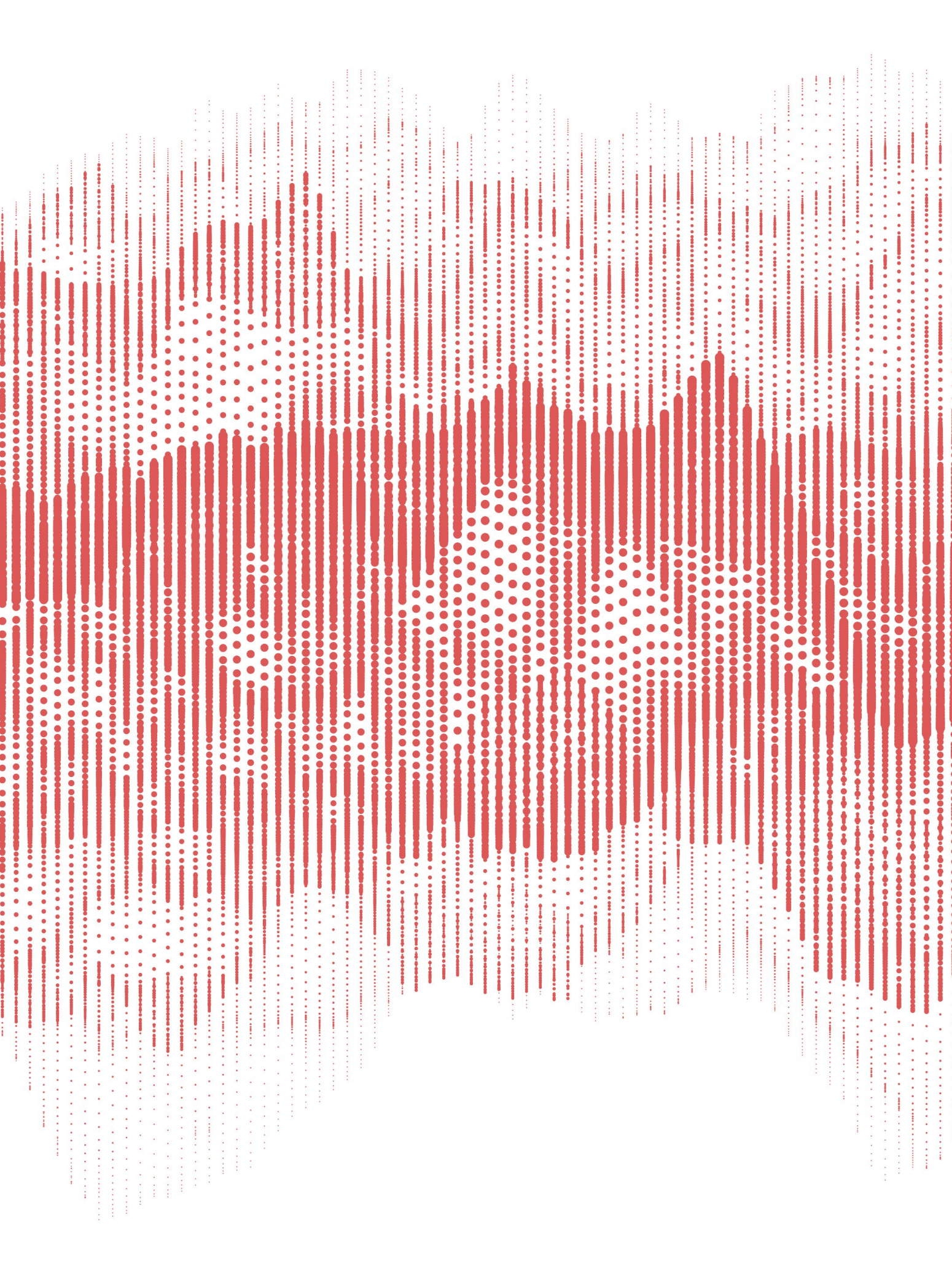
Therefore, it is understood that many professionals tend to the needs of this audience. Recently, institutions started hiring audio describers to describe images and audiovisual resources, as well as orofacial articulators, available to the hearing-impaired student that can read lips but not use Libras. Still, the Libras interpreter is one of the most sought professionals, given that they cannot be replaced by pedagogical support, for example. Their work is very specific and well-articulated in legal documents.

To clarify, the law treats this audience as "Libras and subtitling users". Therefore, video subtitling does not replace the interpreter, since Portuguese is the second language of the hearing-impaired student.

About the authors

Karina Nones Tomelin is psychologist, pedagogue, master in Education. Currently coordinating teacher training and student development projects at Universidade Positivo. Implemented and restructured student support centers in higher education institutions, focused on the disabled student's learning and inclusion.

Tatiana Santos is pedagogue, art-educator, master and PhD in Education, researcher on inclusion in higher education. Implemented accessibility centers in on-site learning institutions and distance learning hubs. Currently working as a specialized consultant on inclusion, accessibility, teacher training and academic management.



Annex I

Educational institutions

Company	State	Institutional email	Site	Respondent name
Serviço Nacional de Aprendizagem Industrial – SENAI/AC	AC	senai@senaiac.org.br	senaiac.org.br	Antoine Alexsandra Nefertiti Souza de Melo
Universidade Federal do Acre	AC	reitoria@ufac.br	ufac.br	Luiz Augusto Matos da Silva
Serviço Nacional de Aprendizagem Industrial – SENAI/AL	AL	ead@al.senai.br	al.senai.br	Ari Soares de Castro Júnior
Universidade Estadual de Ciências da Saúde de Alagoas – UNCISAL	AL	ced.uncisal@gmail.com	ced.uncisal.edu.br	Maria Aurea Caldas Souto
Universidade Federal de Alagoas	AL	gr@reitoria.ufal.br	ufal.edu.br	Ilson Mendonça Soares Prazeres
Centro de Educação Tecnológico do Amazonas – CETAM EAD	AM	online@cetam.am.gov.br	cetam.am.gov.br	Marcia Fernanda Izidoro Gomes
Instituto Federal de Educação, Ciência e Tecnologia do Amazonas – IFAM	AM	ded_proen@ifam.edu.br	ifam.edu.br	Fabio Serra Ribeiro Couto
Serviço Nacional de Aprendizagem Industrial – SENAI/AM	AM	ead@am.senai.br	fieam.org.br/senai/senai-ead	Horacio Gonçalves Martins
Universidade do Estado do Amazonas	AM	nead@uea.edu.br	uea.edu.br	Marcelo Carvalho Tavares
Instituto Federal do Amapá – IFAP	AP	reitoria@ifap.edu.br	ifap.edu.br	Adrielma Nunes Ferreira Bronze
Serviço Nacional de Aprendizagem Industrial – SENAI/AP	AP	joseph.rocha@edu.ap.senai.br	ap.senai.br	Joseph Douglas Lacerda da Rocha de Souza
Centro Universitário Jorge Amado – UNIJORGE	BA	edinaldo.neves@unijorge.edu.br	unijorge.edu.br	Edinaldo Luz das Neves
Escola Bahiana de Medicina e Saúde Pública	BA	martamenezes@bahiana.edu.br	bahiana.edu.br	Marta Silva Menezes
Escola de Saúde Pública da Bahia Professor Jorge Novis	BA	eesp.ce@gmail.com	saude.ba.gov.br.eesp	Miralva Ferraz Barreto
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Annex II

Part 2 – Profile of educational institutions and cost of courses

Table 2.1 – Number of institutions participating in the 2017 Census, by administrative category

Administrative category	No. of institutions
Federal public educational institution	64
State public educational institution	30
Municipal public educational institution	3
For-profit private educational institution	97
Non-profit private educational institution	79
"S System" institution	37
NGOs and third sector	4
Government or public body	21
Other	6
Total	**341**

Table 2.2 – State public educational institutions that participate in UAB and UNA-SUS in absolute numbers and percentage

	UAB		UNA-SUS	
	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)
Participates	22	73.33	5	16.67
Does not participate	8	26.67	24	80
Not informed	0	0	1	3.33
Total	**30**	**100**	**30**	**100**

Table 2.3 – Evolution of the percentage of institutions per region

	2016	2017
Southeast	37	42
South	27	23
Northeast	18	19
Central-West	11	11
North	7	6

Table 2.4 – Institutions headquartered in each state, in absolute numbers and percentage

State	No. of institutions	Percentage (%)
AC	2	0.59
AL	3	0.88
AM	4	1.17
AP	2	0.59
BA	10	2.93
CE	12	3.52
DF	24	7.04
ES	5	1.47

(continue)

(Table 2.4 – conclusion)

State	No. of institutions	Percentage (%)
GO	5	1.47
MA	5	1.47
MS	6	1.76
MT	2	0.59
MG	37	10.85
PA	6	1.76
PB	6	1.76
PE	15	4.4
PI	2	0.59
PR	28	8.21
RJ	35	10.26
RN	6	1.76
RO	3	0.88
RR	1	0.29
RS	28	8.21
SC	22	6.45
SP	67	19.65
SE	4	1.17
TO	1	0.29
Total	341	100.01

Table 2.5 – States with the highest presence of respondent institutions headquartered, in absolute numbers

State	2016	2017
SP	58	67
MG	27	37
RJ	31	35
RS	29	28
PR	27	28

Table 2.6 – Number of headquarters of institutions, by state capitals or DF and inland cities

Headquarters location	2016	2017
Capitals or Federal District	65	61
Inland cities	35	39

Table 2.7 – Course modalities offered, in absolute numbers and percentage of institutions

Modality	Number	Percentage (%)
Distance learning only	32	9.38
Distance learning and on-site	159	46.63
Distance learning, blended and on-site	123	36.07
Blended only	2	0.59
Blended and on-site	21	6.16
Not informed	4	1.17
Total	**341**	**100**

Table 2.8 – Years of operation in the educational market, in absolute numbers and percentage

Years of operation	No. of institutions	Percentage (%)
Less than 1 year	1	0.29
1-5 years	10	2.93
6-10 years	35	10.26
11-15 years	35	10.26
16-20 years	31	9.09
More than 20 years	228	66.86
Not informed	1	0.29
Total	**341**	**99.98**

Table 2.9 – Years of operation in distance learning, in absolute numbers and percentage

Years of operation	No. of institutions	Percentage (%)
Less than 1 year	14	4.11
1-5 years	84	24.63
6-10 years	101	29.62
11-15 years	76	22.29
16-20 years	36	10.56
More than 20 years	28	8.21
Not informed	2	0.59

Table 2.10 – What is considered an accredited blended course, in absolute numbers and percentage of institutions

Definition of accredited blended courses	No. of institutions	Percentage (%)
Accredited courses, originally on-site, with up to 20% of their official workload given at a distance	96	28.15
Accredited courses, originally distance learning, with some of their workload required on-site	59	17.3
Accredited on-site courses that incorporate technology into their teaching practices, with no official change in the workload, for example, on-site courses that incorporate blended learning, inverted classrom or adaptive learning, among others	25	7.33
Not informed	189	55.43

Table 2.11 – Size of institutions in number of students, in absolute numbers and percentage

Number of students	Number	Percentage (%)
Up to 99	23	6.74
100-499	58	17.01
500-999	39	11.44
1,000-4,999	97	28.45
5,000-9,999	45	13.2
10,000-49,999	35	10.26
50,000-100,000	12	3.52
More than 100,000	17	4.98
Not sure	8	2.35
Not informed	7	2.05

Table 2.12 – Cost of courses, by type of course, in percentage of institutions

Cost range	Full distance learning	Blended	On-site
Less than R$ 100	5.17	4.12	7.92
R$ 101-R$ 250	9.24	6.28	9.09
R$ 251-R$ 500	16.80	5.03	14.66
R$ 500-R$ 1,000	6.70	8.91	22.58
R$ 1,001-R$ 2,000	1.55	3.27	18.48
R$ 2,001-R$ 3,500	1.19	1.09	9.09
More than R$ 3,500	0.16	0.83	7.33
Not informed	63.56	74.53	41.64

Table 2.13 – Cost of accredited full distance learning courses, by administrative category, in percentage of institutions

	Federal public	State public	For-profit private	Non-profit private	"S System" institution	NGOs and third sector	Average
Less than R$ 100	12.50	6.67	2.06	2.53	8.11	0	5.17
R$ 101 - R$ 250	3.13	6.67	24.74	17.72	21.62	0	9.24
R$ 25 - R$ 500	7.81	0	30.93	43.04	10.81	25	16.80
R$ 500 - R$ 1,000	6.25	3.33	6.19	10.13	2.70	25	6.70
R$ 1,001 - R$ 2,000	7.81	0	2.06	2.53	0	0	1.55
R$ 2,001 - R$ 3,500	0	0	2.06	0	2.70	0	1.19
More than R$ 3,500	0	0	0	1.27	0	0	0.16
Not informed	62.50	83.33	47.42	34.18	56.76	75	63.56

Table 2.14 – Cost of accredited full blended courses, by administrative category, in percentage of institutions

	Federal public	State public	For-profit private	Non-profit private	"S System" institution	NGOs and third sector	Average
Less than R$ 100	7.81	10	1.03	1.27	8.11	0	4.12
R$ 101 - R$ 250	4.69	10	10.31	6.33	18.92	0	6.28
R$ 251 - R$ 500	1.56	3.33	14.43	10.13	10.81	0	5.03
R$ 500 -R$ 1.000	0	0	16.49	18.99	10.81	25	8.91
R$ 1.001 - R$ 2.000	9.38	0	8.25	3.80	0	0	3.27
R$ 2.001 - R$ 3.500	3.13	0	3.09	2.53	0	0	1.09
More than R$ 3.500	0	3.33	2.06	1.27	0	0	0.83
Not informed	73.44	76.67	61.86	62.03	56.76	75	74.53

Table 2.15 – Cost of non-corporate open courses, by administrative category, in percentage of institutions

	Federal public	State public	For-profit private	Non-profit private	"S System" institution	NGOs and third sector	Average
Less than R$ 100	18.75	13.33	16.49	18.99	48.65	19.05	21.07
R$ 101 - R$ 250	4.69	6.67	14.43	11.39	10.81	0	9.12
R$ 25 - R$ 500	1.56	6.67	9.28	6.33	8.11	0	3.99
R$ 500 - R$ 1,000	0	3.33	6.19	5.06	5.41	4.76	3.09
R$ 1,001 - R$ 2,000	0	0	0	1.27	2.70	0	0.50
R$ 2,001 - R$ 3,500	0	0	0	0	2.70	0	0.34
More than R$ 3,500	0	0	0	0	0	0	0
Not informed	76.56	73.33	63.92	63.29	32.43	76.19	65.92

Table 2.16 – Cost of corporate open courses, by administrative category, in percentage of institutions

	Federal public	State public	For-profit private	Non-profit private	"S System" institution	NGOs and third sector	Average
Less than R$ 100	9.38	10	1.03	5.06	16.22	19.05	7.59
R$ 101 - R$ 250	0	0	3.09	0	10.81	9.52	2.93
R$ 25 - R$ 500	0	0	6.19	0	5.41	4.76	5.17
R$ 500 - R$ 1,000	0	0	0	1.27	2.70	4.76	1.09
R$ 1,001 - R$ 2,000	0	0	0	0	2.70	4.76	0.93
R$ 2,001 - R$ 3,500	0	0	0	0	2.70	0	0.34
More than R$ 3,500	0	0	1.03	0	2.70	0	0.47
Not informed	90.63	90	89.69	93.67	72.97	61.90	84.23

Part 3 – On-site support hubs

(Tables in this section are based on a total of 351 institutions.)

Table 3.1 – Institutions with hubs, in absolute numbers and percentage

	No. of institutions	Percentage (%)
With hubs	108	31
Without hubs	239	68
Not informed	4	1
Total	351	100

Table 3.2 – Number of on-site support hubs created and closed in 2017

	No. of hubs
Total hubs	11,008
Created in 2017	3,137
Closed in 2017	137

Table 3.3 – Number of hubs located in state capitals or DF and inland cities

Location of hubs	No. of hubs
Capitals or Federal District	1,691
Inland cities	7,620
Same state as the headquarters	3,967
States other than the headquarters	5,286

Table 3.4 – Total number of hubs, hubs created and closed in 2017 and location of hubs, by administrative category

	Federal public	State public	Municipal public	For-profit private	Non-profit private	"S System" institution	NGOs and third sector	Government or public body
Total hubs	1,568	931	28	3,974	1,972	1,187	0	93
Created in 2017	81	157	14	1,476	531	242	0	0
Closed in 2017	33	4	0	63	28	6	0	0
Capitals or Federal District	139	54	1	638	602	191	0	65
Inland cities	1,376	723	27	3,172	1,298	996	0	28
Same state as the headquarters	1,015	855	13	885	756	434	0	8
States other than the headquarters	354	5	15	3,027	1,106	695	0	84

Table 3.5 – Function of hubs, in absolute numbers and percentage of institutions

	No. of institutions	Percentage (%)
Student recruitment	157	46.04
Student administrative support	187	54.84
Student pedagogical support	185	54.25
Hosting collaborative work by students	154	45.16

(continue)

(Table 3.5 – conclusion)

	No. of institutions	Percentage (%)
Spaces to broadcast videoclasses/teleclasses	117	34.31
Student social interaction	159	46.63
Not informed	116	34.02

Part 4 – Offer of courses, number of enrollments and dropout rate

Table 4.1 – Number of courses offered, by type of course

Type of course	No. of courses
Full distance learning	4,570
Blended	3,041
Open non-corporate	16,557
Open corporate	5,574
Total	**29,742**

Table 4.2 – Number of accredited courses, by academic level

	Full distance learning	Blended
Primary education	194	37
Secondary education	8	3
Youth and adult primary education	76	115
Youth and adult secondary education	158	334
Technical vocational	241	351
Higher education: continuing – specific training	6	7
Higher education: continuing – complementary studies	258	28
Higher education: undergraduate – bachelor's degree	328	564
Higher education: undergraduate – teaching degree	408	286
Higher education: undergraduate – bachelor's and teaching degree	347	480
Higher education: undergraduate – technology	478	263
Higher education: graduate – sensu lato (specialization)	1788	353
Higher education: graduate – sensu lato (MBA)	265	128
Higher education: graduate – sensu stricto (master's degree)	13	67
Higher education: graduate – sensu stricto (doctorate)	2	25

Table 4.3 – Number of accredited courses, by academic level and administrative category

	Federal public		State public		Municipal public		For-profit private		Non-profit private		"S System" institution		NGOs and third sector		Government or public body	
	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended
Primary education	131	1	0	26	0	0	27	5	35	0	1	5	0	0	0	0
Secondary education	3	1	0	0	0	0	4	2	1	0	0	0	0	0	0	0
Youth and adult primary education	0	1	32	1	0	0	11	12	1	0	32	101	0	0	0	0
Youth and adult secondary education	0	1	37	1	0	0	19	16	2	0	100	316	0	0	0	0
Technical vocational	34	151	69	53	0	0	86	87	8	0	36	53	7	0	1	7
Higher education: continuing – specific training	0	5	0	2	0	0	2	0	0	0	0	0	4	0	0	0
Higher education: continuing – complementary studies	223	2	0	2	0	0	15	15	3	9	0	0	0	0	17	0
Higher education: undergraduate – bachelor's degree	42	33	15	38	2	0	154	246	109	241	2	3	3	3	0	0
Higher education: undergraduate – teaching degree	122	51	31	59	13	0	131	106	106	68	1	0	3	2	0	0
Higher education: undergraduate – bachelor's and teaching degree	34	94	10	1	0	0	188	175	104	205	3	0	6	5	0	0
Higher education: undergraduate – technology	7	18	6	6	7	0	260	130	190	101	8	8	0	0	0	0
Higher education: graduate – sensu lato (specialization)	172	62	35	34	0	0	907	101	631	148	32	3	2	0	9	5

(continue)

(Table 4.3 – conclusion)

	Federal public		State public		Municipal public		For-profit private		Non-profit private		"S System" institution		NGOs and third sector		Government or public body	
	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended
Higher education: graduate – sensu lato (MBA)	22	7	1	1	0	0	192	42	50	69	0	9	0	0	0	0
Higher education: graduate – sensu stricto (master's degree)	5	33	0	27	0	0	2	0	5	6	0	0	0	0	1	1
Higher education: graduate – sensu stricto (doctorate)	1	14	0	9	0	0	0	0	1	1	0	0	0	0	0	1

Table 4.4 – Number of accredited courses, by knowledge area

Knowledge area	Full distance learning	Blended
Applied Social Sciences	514	439
Other	446	40
Humanities, Linguistics, Literature and Arts	429	312
Business and Management	177	73
Exact and Earth Sciences	129	125
Engineering	70	141
Health Sciences	67	201
Military Studies	62	10
Educational and Social Development	37	6
Information and Communication	32	38
Biological Sciences	28	34

Knowledge area	Full distance learning	Blended
Environment and Health	17	20
Security	17	11
Industrial Processes and Control	15	26
Agricultural Sciences	11	35
Tourism, Hospitality and Leisure	8	5
Cultural Production and Design	6	8
Food Production	5	6
Industrial Production	5	2
Natural Resources	5	3
Infrastructure	4	8

Table 4.5 – Number of accredited courses, by knowledge area and administrative category

	Federal public		State public		Municipal public		For-profit private		Non-profit private		"S System" institution		NGOs and third sector		Government or public body	
	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended
Exact and Earth Sciences	46	40	11	13	3	0	32	24	14	24	5	0	2	0	2	0
Biological Sciences	9	6	3	1	1	0	6	11	2	8	0	0	0	0	5	0
Engineering	5	5	6	4	0	0	29	58	15	34	0	6	0	0	0	0
Health Sciences	12	19	4	3	1	0	27	81	11	49	1	0	0	0	0	0
Agricultural Sciences	6	5	3	0	0	0	1	20	0	5	1	0	0	0	0	0
Applied Social Sciences	56	46	16	13	2	0	153	87	129	145	9	0	9	3	11	0
Humanities, Linguistics, Literature and Arts	94	42	25	17	8	0	126	109	75	71	9	0	6	2	11	0
Environment and Health	1	3	0	2	0	0	11	9	2	2	1	2	0	0	0	0
Industrial Processes and Control	1	1	0	1	0	0	2	6	0	1	12	16	0	0	0	0
Educational and Social Development	15	1	0	3	0	0	0	0	11	1	0	0	0	0	0	0
Business and Management	8	4	1	6	0	0	63	40	49	6	7	11	0	0	0	0
Information and Communication	6	5	0	3	0	0	15	12	1	3	5	12	4	0	0	0
Infrastructure	1	1	0	0	0	0	0	0	1	0	1	7	0	0	0	0
Military Studies	61	7	0	0	0	0	0	0	0	0	0	0	0	0	1	3
Food Production	3	1	0	1	0	0	1	1	0	0	1	3	0	0	0	0
Cultural Production and Design	1	1	0	1	0	0	2	5	0	0	1	1	2	0	0	0
Industrial Production	2	1	0	0	0	0	0	0	1	0	1	1	0	0	0	0
Natural Resources	1	1	0	0	0	0	2	1	1	0	0	1	0	0	0	0
Security	3	3	0	3	0	0	5	2	1	0	6	3	1	0	0	0
Tourism, Hospitality and Leisure	2	2	0	2	1	0	2	1	1	0	1	0	0	0	0	0
Other	17	6	14	0	7	0	33	0	104	0	74	12	13	0	80	22

Table 4.6 – Number of corporate and non-corporate open courses

Type of open course	Non-corporate	Corporate
Professional initiation	7,579	1,124
Update course	4,374	1,114
Operational training	793	2,630
Improvement training	1,451	222
Preparation for standardized and admission tests etc.	1,130	117
University extension	579	37
Training in social/behavioral skills	263	296
Other	278	9
Languages	110	25
Total	**16,557**	**5,574**

Table 4.7 – Number of open courses, by type and administrative category

	Federal public		State public		Municipal public		For-profit private		Non-profit private		"S System" institution		NGOs and third sector	
	Non-corp.	Corp.	Non-corp.	Corp.	Non-corp.	Corp.	Non-corp.	Corp.	Non-corp.	Corp.	Non-corp.	Corp.	Non-corp.	Corp.
Professional initiation	26	22	92	0	5,593	598	968	114	685	207	18	18	194	38
Operational training	45	43	22	1	369	1655	41	15	171	104	34	42	108	262
Training in social/ behavioral skills	11	17	9	0	77	78	5	17	136	20	8	19	14	87
Update course	109	88	138	39	3,887	835	82	24	75	55	15	3	65	40
Improvement training	1	35	36	6	1,113	154	217	3	71	24	2	0	0	0
University extension	165	2	61	0	176	5	151	1	26	29	0	0	0	0
Preparation for standardized and admission tests etc.	4	1	1	0	1002	1	8	0	0	0	115	115	0	0
Languages	7	1	3	1	57	5	9	3	28	15	1	0	5	0
Other	121	0	71	0	64	0	18	0	1	8	0	0	0	1

Table 4.8 – Number of enrollments, by type of course

Type of course	Enrollments
Full distance learning	1,320,025
Blended	1,119,031
Open non-corporate	3,839,958
Open corporate	1,459,813
Total	**7,738,827**

Table 4.9 – Evolution of the number of enrollments, by type of course

	2009	2010	2011	2012	2013	2014	2015	2016	2017
Full distance learning	528,320	656,524	817,887	1,141,260	692,279	519,839	498,683	561,667	1,320,025
Blended	–	–	–	336,223	190,564	476,484	609,338	217,175	1,119,031
Open non-corporate	–	755,194	–	3,568,856	1,628,220	1,780,000	3,505,582	1,675,131	3,839,958
Open corporate	–	850,203	–	726,127	1,271,016	1,092,383	435,309	1,280,914	1,459,813
Total open courses	–	1,605,397	2,771,486	4,294,983	2,899,236	1,092,383	3,940,891	2,956,045	5,299,771
Grand total	**528,320**	**2,261,921**	**3,589,373**	**5,772,466**	**3,782,079**	**3,868,706**	**5,048,912**	**3,734,887**	**7,738,827**

Table 4.10 – Evolution of the number of enrollments, by academic level

	2012	2013	2014	2015	2016	2017
Primary education	230		640	4,381	7,497	74,048
Secondary education	710		1,614	5,515	3,831	1,433
Youth and adult primary education	9,591	25,316	23,521	21,327	19,641	7,911
Youth and adult secondary education	14,791	59,053	46,549	39,532	42,308	24,954
Technical vocational	634	35,521	60,177	43,841	55,860	26,667
Higher education: continuing – specific training	400	4,419	441	734	1,268	2,800
Higher education: continuing – complementary studies	0	3,625	606	68,971	5,522	29,068
Higher education: undergraduate – bachelor's degree	43,701	80,724	62,591	82,231	105,536	287,270
Higher education: undergraduate – teaching degree	22,452	170,414	89,429	148,222	135,236	214,450
Higher education: undergraduate – bachelor's and teaching degree	3,685	74,428	34,004	134,262	32,957	253,545
Higher education: undergraduate – technology	9,264	122,693	102,314	119,362	91,086	215,450
Higher education: graduate – sensu lato (specialization)	3,989	80,532	75,066	106,216	49,400	146,420
Higher education: graduate – sensu lato (MBA)	0	35,047	17,357	21,249	10,846	35,710
Higher education: graduate – sensu stricto (master's degree)	0	416	430	214	559	278
Higher education: graduate – sensu stricto (doctorate)	0	91	100	0	120	21
Total	**109,447**	**692,279**	**514,839**	**796,057**	**561,667**	**1,320,025**

Table 4.11 – Enrollments in accredited courses, by administrative category and academic level

	Federal public		State public		Municipal public		For-profit private	
	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended
Primary education	3,740	1	0	6,055	0	0	50,744	0
Secondary education	501	1	0	0	0	0	832	200
Youth and adult primary education	0	1	837	16,148	0	0	373	460
Youth and adult secondary education	0	1	1,327	32,296	0	0	4,823	1,320
Technical vocational	7,393	1,111	803	23,573	0	0	5,969	3,202
Higher education: continuing – specific training	0	216	0	192	0	0	1,600	0
Higher education: continuing – complementary studies	24,918	1	0	962	0	0	3,112	0
Higher education: undergraduate – bachelor's degree	9,456	4,197	11,569	16,019	15	0	226,589	249,347
Higher education: undergraduate – teaching degree	26,172	15,152	17,280	42,814	0	0	141,440	244,327
Higher education: undergraduate – bachelor's and teaching degree	7,478	34,930	2,030	250	0	0	22,0681	105,122
Higher education: undergraduate – technology	1,747	422	2,007	10,329	0	0	193,904	110,273
Higher education: graduate – sensu lato (specialization)	37,000	5,417	6,890	4,856	0	0	63,152	22,220
Higher education: graduate – sensu lato (MBA)	4,202	1,072	0	250	0	0	26,924	2,065
Higher education: graduate – sensu stricto (master's degree)	151	1,220	0	1,226	0	0	44	0
Higher education: graduate – sensu stricto (doctorate)	1	481	0	440	0	0	0	0
Total	**122,759**	**64,223**	**42,743**	**155,410**	**15**	**0**	**940,187**	**738,536**
Total by category	**186,982**		**198,153**		**15**		**1,678,723**	

	Non-profit private		"S System" institution		NGOs and third sector		Government or public body	
	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended
Primary education	19,489	0	75	990	0	0	0	0
Secondary education	100	0	0	0	0	0	0	0
Youth and adult primary education	89	0	6,612	4,713	0	0	0	0
Youth and adult secondary education	676	0	18,128	16,541	0	0	0	0
Technical vocational	888	0	10,597	7,181	930	0	87	166
Higher education: continuing – specific training	0	0	0	0	1,200	0	0	0
Higher education: continuing – complementary studies	16	0	0	0	0	0	1,022	0
Higher education: undergraduate – bachelor's degree	35,453	59,792	534	730	3,500	400	0	0
Higher education: undergraduate – teaching degree	28,252	9,511	165	0	900	170	0	0
Higher education: undergraduate – bachelor's and teaching degree	17,862	38,722	699	0	4,400	570	0	0
Higher education: undergraduate – technology	16,552	5,676	1,240	862	0	0	0	0
Higher education: graduate – sensu lato (specialization)	27,111	7,597	8,368	395	330	0	3,569	111
Higher education: graduate – sensu lato (MBA)	4,584	6,168	0	310	0	0	0	0
Higher education: graduate – sensu stricto (master's degree)	40	195	0	0	0	0	43	24
Higher education: graduate – sensu stricto (doctorate)	20	23	0	0	0	0	0	15
Total	**151,132**	**127,684**	**46,418**	**31,722**	**11,260**	**1,140**	**4,721**	**316**
Total by category	**278,816**		**78,140**		**12,400**		**5,037**	

Table 4.12 – Enrollments in accredited courses, by administrative category and knowledge area

	Federal public		State public		Municipal public		For-profit private	
	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended
Exact and Earth Sciences	7,888	5,957	5,604	16,970	0	0	27,797	6,964
Biological Sciences	1,194	421	608	7,767	0	0	1,702	3,800
Engineering	461	471	8,066	1,488	0	0	13,124	29,201
Health Sciences	3517	833	804	552	0	0	16,858	141,153
Agricultural Sciences	873	31	300	0	0	0	2,277	1,233
Applied Social Sciences	29,224	5,670	4,758	21,231	15	0	189,778	146,069
Humanities, Linguistics, Literature and Arts	21,497	11,647	11,839	20,536	0	0	124,066	168,520
Environment and Health	1	162	0	217	0	0	1,023	9,221
Industrial Processes and Control	1	1	0	141	0	0	291	2,022
Educational and Social Development	1,775	1	0	3,173	0	0	0	0
Business and Management	2,547	144	500	9,889	0	0	57,425	78,759
Information and Communication	1,658	182	0	3,161	0	0	20,558	12,333
Infrastructure	1	6	0	0	0	0	0	0
Military Studies	8,001	3,020	0	0	0	0	0	0
Food Production	621	1	0	216	0	0	15	256
Cultural Production and Design	1	1	0	1,471	0	0	30	77
Industrial Production	216	1	0	0	0	0	0	0
Natural Resources	1	1	0	0	0	0	106	362
Security	836	81	0	5,212	0	0	3,189	1,750
Tourism, Hospitality and Leisure	1,201	177	0	89	15	0	829	218
Other	3,905	253	1,744	0	0	0	5,330	0

	Non-profit private		"S System" institution		NGOs and third sector		Government or public body	
	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended	Distance learning	Blended
Exact and Earth Sciences	2,027	1,652	1,180	0	400	0	126	0
Biological Sciences	530	890	0	0	0	0	161	0
Engineering	6,863	6,721	0	719	0	0	0	0
Health Sciences	7,702	8,617	49	0	0	0	0	0
Agricultural Sciences	0	1,997	645	0	0	0	0	0
Applied Social Sciences	21,528	32,678	3,624	0	1,700	350	601	0
Humanities, Linguistics, Literature and Arts	27,036	12,366	2,727	0	2,050	220	942	0
Environment and Health	54	164	127	59	0	0	0	0
Industrial Processes and Control	0	33	1,157	1,775	0	0	0	0
Educational and Social Development	375	332	0	0	0	0	0	0
Business and Management	5,390	929	3,228	614	0	0	0	0
Information and Communication	90	153	292	433	430	0	0	0
Infrastructure	55	0	105	283	0	0	0	0
Military Studies	0	0	0	0	0	0	20	106
Food Production	0	0	29	53	0	0	0	0
Cultural Production and Design	0	0	354	93	250	0	0	0
Industrial Production	3	0	20	23	0	0	0	0
Natural Resources	274	0	0	3,545	0	0	0	0
Security	164	0	1,805	498	270	0	0	0
Tourism, Hospitality and Leisure	1	0	332	0	0	0	0	0
Other	19,632	0	61,294	1,644	950	0	4,315	1,471

Table 4.13 – Number of enrollments in corporate and non-corporate open courses

Type of course	Open non-corporate	Open corporate
Professional initiation	1,498,314	825,631
Operational training	464,782	429,289
Training in social/behavioral skills	215,830	44,184
Update course	1,080,685	140,324
Improvement training	63,439	13,144
University extension	77,920	3,272
Preparation for standardized and admission tests etc,	32,345	355
Languages	128,559	3,586
Other	278,084	28

Table 4.14 – Number of enrollments in open courses, by type of course

	Federal public		State public		Municipal public		For-profit private	
	Non-corp.	Corp.	Non-corp.	Corp.	Non-corp.	Corp.	Non-corp.	Non-corp.
Professional initiation	86,373	3,201	78,642	0	0	0	223,455	726,625
Operational training	112,730	8,003	677	360	0	0	8,131	81,458
Training in social/ behavioral skills	35,972	1,972	1,006	0	0	0	13,310	15,050
Update course	534,959	7,916	78,757	8,698	0	0	261,517	76,611
Improvement training	1	3,428	3,633	6,542	0	0	47,579	1,670
University extension	31,488	26	8,256	0	0	0	21,484	1,518
Preparation for standardized and admission tests etc,	901	1	1,200	0	0	0	4,160	0
Languages	83,502	1	3,367	360	0	0	24,534	0
Other	126,572	0	29,182	0	0	0	121,060	0

		Non-profit private		"S System" institution		NGOs and third sector		Government or public body	
		Corp.	Non-corp.	Corp.	Non-corp.	Corp.	Non-corp.	Non-corp.	Corp.
	Professional initiation	16,527	19,452	1,000,000	23,400	43,954	386	4,745	1,703
	Operational training	1,864	2,517	29,540	34,609	80,650	1,580	231,100	235,200
	Training in social/ behavioral skills	680	5,595	139,527	4769	23,335	875	1,910	4,078
	Update course	10,071	6,392	20,868	8,045	12,822	218	161,601	2,444
	Improvement training	824	68	8,811	1,436	2,101	0	0	0
	University extension	15,471	140	1,221	1,588	0	0	0	0
	Preparation for standardized and admission tests etc,	600	0	0	0	25,484	354	0	0
	Languages	420	3,210	4,242	15	3,985	0	8,509	0
	Other	767	0	83	8	0	0	0	20

Table 4.15 – Dropout rates of accredited full distance learning courses, by administrative category, with average, in percentage of institutions

Dropout range	Federal public educational institution	State public educational institution	For-profit private educational institution	Non-profit private educational institution	"S System" institution	Government or public body	Average
0%-5%	6.25	3.33	9.28	7.59	2.70	4.76	5.65
6%-10%	6.25	6.67	11.34	6.33	13.51	0	7.35
11%-15%	1.56	0	5.15	11.39	5.41	4.76	4.71
16%-20%	4.69	6.67	7.22	10.13	8.11	0	6.14
21%-25%	9.38	10	6.19	11.39	2.70	4.76	7.40
26%-50%	18.75	6.67	4.12	8.86	2.70	0	6.85
51%-75%	4.69	0	2.06	0	0	0	1.13
76%-100%	0	0	0	0	0	0	0
Not applicable	1.56	3.33	0	2.53	0	0	1.24
Not available	4.69	13.33	6.19	8.86	10.81	4.76	8.11
Not informed	42.19	50	48.45	32.91	54.05	80.95	51.43

Table 4.16 – Dropout rates of accredited blended courses, by administrative category, with average, in percentage of institutions

Dropout range	Federal public educational institution	State public educational institution	For-profit private educational institution	Non-profit private educational institution	"S System" institution	Government or public body	Average
0%-5%	4.69	6.67	3.09	7.59	8.11	4.76	5.82
6%-10%	1.56	0	10.31	10.13	2.70	9.52	5.70
11%-15%	4.69	6.67	12.37	10.13	2.70	0	6.09
16%-20%	3.13	0	7.22	1.27	5.41	4.76	3.63
21%-25%	3.13	3.33	1.03	1.27	8.11	0	2.81
26%-50%	4.69	10	0	0	13.51	0	4.70
51%-75%	1.56	0	1.03	0	0	0	0.43
76%-100%	0	0	0	0	0	0	0.00
Not applicable	0	3.33	1.03	1.27	0	0	0.94
Not available	6.25	0	4.12	7.59	5.41	0	3.90
Not informed	70.31	70	59.79	60.76	54.05	80.95	65.98

Table 4.17 – Dropout rates of non-corporate open courses, by administrative category, with average, in percentage of institutions

Dropout range	Federal public educational institution	State public educational institution	For-profit private educational institution	Non-profit private educational institution	"S System" institution	Government or public body	Average
0%-5%	1.56	0	14.43	11.39	8.11	4.76	6.71
6%-10%	3.13	6.67	6.19	2.53	5.41	0	3.99
11%-15%	0	6.67	2.06	2.53	5.41	4.76	3.57
16%-20%	1.56	6.67	1.03	2.53	13.51	9.52	5.80
21%-25%	1.56	3.33	1.03	2.53	5.41	0	2.31
26%-50%	7.81	0	4.12	5.06	16.22	9.52	7.12
51%-75%	6.25	3.33	1.03	0	5.41	4.76	3.46
76%-100%	0	0	0	0	0	0	0.00
Not applicable	1.56	3.33	2.06	2.53	0	0	1.58
Not available	4.69	10	5.15	7.59	13.51	0	6.82
Not informed	71.88	60	62.89	63.29	27.03	66.67	58.63

Table 4.18 – Dropout rates of corporate open courses, by administrative category, with average, in percentage of institutions

Dropout range	Federal public educational institution	State public educational institution	For-profit private educational institution	Non-profit private educational institution	"S System" institution	Government or public body	Average
0%-5%	1.56	0	4.12	0	10.81	0	2.75
6%-10%	0	0	2.06	0	2.70	14.29	3.18
11%-15%	0	0	0	0	2.70	0	0.45
16%-20%	3.13	3.33	0	2.53	2.70	14.29	4.33
21%-25%	0	10	0	2.53	2.70	4.76	3.33
26%-50%	3.13	0	1.03	0	2.70	14.29	3.53
51%-75%	0	0	0	0	0	0	0
76%-100%	0	0	0	0	0	0	0
Not applicable	1.56	0	0	0	0	0	0.26
Not available	4.69	6.67	3.09	1.27	8.11	0	3.97
Not informed	85.94	80	89.69	93.67	67.57	52.38	78.21

Table 4.19 – Dropout rates by type of course, with average, in percentage of institutions

Dropout range	Full distance learning	Blended	Open non-corporate	Open corporate	Average
0%-5%	5.65	5.82	6.71	2.75	5.23
6%-10%	7.35	5.70	3.99	3.18	5.06
11%-15%	4.71	6.09	3.57	0.45	3.71
16%-20%	6.14	3.63	5.80	4.33	4.98
21%-25%	7.40	2.81	2.31	3.33	3.96
26%-50%	6.85	4.70	7.12	3.53	5.55
51%-75%	1.13	0.43	3.46	0	1.26
76%-100%	0	0	0	0	0
Not applicable	1.24	0.94	1.58	0.26	1.01
Not available	8.11	3.90	6.82	3.97	5.70
Not informed	51.43	65.98	58.63	78.21	63.56

Part 5 – The concept of quality in distance learning

Table 5.1 – Distance learning quality indicators, according to respondents' opinion in 1-5 Likert scale

Quality indicator	Agreement average
Thorough and updated content	4.84
Qualified teachers	4.82
Meeting the students' needs	4.78
Qualified tutors	4.78
Efficient methodologies	4.76
Reliable teaching technology	4.69
Reliable management technology	4.69
Attractive content	4.68
General infrastructure	4.59
Innovative methodologies	4.53
Persistent tutors	4.5
Innovative teaching technology	4.47
Varied content	4.46
Innovative management	4.44
Innovative management technology	4.44
Low dropout rates	4.02

Part 6 – Supplying institutions

Table 6.1 – Location of supplying institutions, by region

Region	No. of institutions
Southeast	29
South	11
Northeast	9
Central-West	6
North	3

Table 6.2 – Location of supplying institutions, by state

State	No. of institutions
SP	18
RJ	6
MG	5
DF	4
PR	4
RS	4
SC	3
CE	2

(continue)

(Table 6.2 – conclusion)

State	No. of institutions
PE	2
RO	2
AC	1
BA	1
GO	1
MA	1
MS	1
PB	1
PI	1
RN	1

Table 6.3 – Size of supplying institutions

Compani size	No. of institutions
Large business: more than 100 employees for services and commerce; more than 500 for industry	15
Medium business: 50 to 99 employees for services and commerce; 100 to 499 for industry	7
Small business: 10 to 49 employees for services and commerce; 20 to 99 for industry	13
Micro business: up to 9 employees for services and commerce; up to 19 for industry	22
Not informed	1

Table 6.4 – Number of supplying institutions that are also educational

Status	No. of institutions
Not educational	26
Also educational	32

Table 6.5 – Services provided by supplying institutions

Services provided	No. of institutions	Percentage (%)
Not informed	4	6.9
Teacher training and distance learning implementation consulting	1	1.72
Consulting and assistance	1	1.72
Corporate training	1	1.72
Creation and implementation of innovative teaching and learning methodologies	1	1.72
Instructional design of online courses	1	1.72
Training and education	1	1.72
In-company and distance learning training	1	1.72
Production of digital learning materials	1	1.72
Training for judges and judiciary employees	1	1.72
Supplying-educational institution	1	1.72
Educational institution with printing services	1	1.72
Audiovisual and publishing	1	1.72
Offering courses	1	1.72
Preparatory for ENADE	1	1.72
Management consulting	1	1.72
IT and pedagogical	1	1.72
Question bank	1	1.72
Higher education institution	1	1.72
Digital marketing consulting for distance learning businesses	1	1.72
Digital platform	1	1.72
Games	1	1.72
TI consulting specializing in distance learning and Moodle	1	1.72
Theology teaching	1	1.72

(continue)

(Table 6.5 – conclusion)

Services provided	No. of institutions	Percentage (%)
Service provider	1	1.72
Learning objects	1	1.72
Training	2	3.45
Information technology – hardware	2	3.45
Ad agency	2	3.45
Press office	2	3.45
Online courses	3	5.17
Teaching	4	6.9
Printing	9	15.52
Information technology – software	22	37.93
Audiovisual production	26	44.83
Publishing (production of print or digital/multimedia written content)	32	55.17

Table 6.6 – Interest for topics already addressed by the Census, in number and percentage of institutions

Topic	No. of institutions	Percentage (%)
Comparison of practices by educational institutions of different administrative categories	20	34.48
Wages paid to distance learning teachers	22	37.93
Workload of courses and arrangement of students in distance learning	24	41.38
Comparison with on-site courses	27	46.55
Adoption of open educational resources in distance learning	30	51.72

(continue)

(Table 6.6 – conclusion)

Topic	No. of institutions	Percentage (%)
Dropout rates in distance learning	33	56.90
Types of content offered in distance learning	34	58.62
List of educational institutions	34	58.62
List of supplying institutions	34	58.62
Distance learning teaching practices	35	60.34
Tables with the full Census data	35	60.34
Profile of distance learning professionals	37	63.79
State of business in distance learning	37	63.79
Geographical reach of distance learning	38	65.52
Profile of distance learning supplying institutions	38	65.52
Distance learning challenges	38	65.52
Profile of educational distance learning institutions	40	68.97
Types of technologies adopted in distance learning	40	68.97
Scope of distance learning in number of students	40	68.97
Profile of distance learning students	41	70.69
Offer of distance learning courses	48	82.76

Table 6.7 – Interest for topics to be addressed by the Census, in number and percentage of institutions

Topic	No. of institutions	Percentage (%)
Adoption of specific management strategies	31	53.45
Detail of issues regarding business in distance learning	36	62.07
Adoption of specific methodologies	42	72.41

(continue)

(Table 6.7 – conclusion)

Topic	No. of institutions	Percentage (%)
Distance learning costs	45	77.59
Adoption of specific technologies	46	79.31
Definition of quality in distance learning	52	89.66

Table 6.8 – Average degree of agreement of supplying and educational institutions regarding quality in distance learning, in 1-5 Likert scale

Topic	Educational	Supplying
High demand for courses	4.0	3.9
Low dropout rates	4.0	4.1
Varied content	4.5	4.1
Innovative management technology	4.4	4.3
Innovative management	4.4	4.4
Innovative teaching technology	4.5	4.5
General infrastructure	4.6	4.5
Persistent tutors	4.5	4.5
Innovative methodologies	4.5	4.5
Reliable teaching technology	4.7	4.6
Attractive content	4.7	4.6
Reliable management technology	4.7	4.7
Qualified tutors	4.8	4.7
Qualified teachers	4.8	4.8
Efficient management	4.7	4.8
Efficient methodologies	4.8	4.8
Quickly meeting the students' needs	4.8	4.8
Thorough and updated content	4.8	4.8

Part 7 – Profile of students

Table 7.1 – Number of institutions that answered each question about the profile of students

	Full distance learning	Blended	Open non-corporate	Open corporate
Gender	135	84	91	43
Race/color	72	56	48	22
School of origin	91	64	54	20
Social class	63	45	46	22

Table 7.2 – Profile of distance learning students by gender, by type of course

	Full distance learning	Blended	Open non-corporate	Open corporate
Male	44.3	33.1	45.1	51.0
Female	55.7	66.9	54.9	49.0

Table 7.3 – Profile of distance learning students by social class, by type of course

	Full distance learning	Blended	Open non-corporate	Open corporate
Class A	2.9	5.3	0.8	17.3
Class B	6.9	10.4	37.8	18.0
Class C	25.6	25.7	41.5	22.0
Class D	34.5	33.6	11.4	22.6
Class E	30.1	25.0	8.5	20.2

Table 7.4 – Profile of distance learning students by school of origin, by type of course

	Full distance learning	Blended	Open non-corporate	Open corporate
Public schools	63.5	66.4	29.0	47.0
Private schools	23.2	27.9	58.6	41.6
Other higher education courses	13.3	5.8	12.3	11.5

Table 7.5 – Profile of distance learning students by race/color, by type of course

	Full distance learning	Blended	Open non-corporate	Open corporate
White	51.1	45.0	49.6	39.4
Pardo	29.7	34.8	30.3	33.1
Black	15.2	14.8	13.7	16.1
Yellow	3.6	5.0	5.2	8.3
Indigenous	0.5	0.4	1.2	3.0

Table 7.6 – Percentage of students of accredited full distance learning courses by average age

Age range	Percentage (%)
Less than 20 years old	3.9
21-25 years	16.3
26-30 years	47.7
31-40 years	30.1
More than 41 years old	2.0

Part 8 – Educational resources available to students

Table 8.1 – Educational resources by type of course, in percentage of institutions

	Full distance learning	Blended	Open non-corporate	Open corporate
Video games	19.7	18.6	28.21	25.68
Accessible resources	28.1	30.8	19.87	29.73
Printouts other than books	35	35.3	20.51	17.57
Online simulations	38.4	35.9	28.21	29.73
Audios	46.8	45.5	41.67	43.24
Physical books	50.7	46.8	11.54	13.51
Digital learning objects	67.5	61.5	57.69	67.57
E-books	70.9	66.7	53.85	52.7
Videos other than teleclasses	71.4	66	64.1	64.86
Digital texts	85.7	76.3	71.15	74.32
Teleclasses	86.2	74.4	69.23	72.97

Table 8.2 – Content repositories by type of course, in percentage of institutions

	Full distance learning	Blended	Open non-corporate	Open corporate
None	2	1.3	14.1	16.22
Content from several suppliers	18.7	16.7	13.46	13.51
Online encyclopedia	35.5	35.3	20.51	17.57
Institution's repository (aggregates contents from external suppliers)	36.9	29.5	19.87	20.27
Repository of open educational resources	40.4	36.5	33.33	27.03
Digital repository with contents by the institution	60.6	53.2	52.56	54.05
Physical library	76.8	71.8	22.44	28.38

Table 8.3 – Support modalities by type of course, in percentage of institutions

	Full distance learning	Blended	Open non-corporate	Open corporate
No support	1	1.3	10.9	4.05
On-site only	1.5	4.5	1.28	1.35
Online only	14.8	5.8	45.51	44.59
On-site and online	77.8	77.6	30.77	36.49

Table 8.4 – Support channels by type of course, in percentage of institutions

	Full distance learning	Blended	Open non-corporate	Open corporate
Internal social network	29.1	28.2	14.74	31.08
SMS	31	35.9	24.36	21.62
Video tutoring	35	31.4	22.44	4.05
Videoconferencing	39.9	33.3	21.15	28.38
Automatic notifications	52.7	45.5	40.38	47.3
Newsboard	67	66	46.79	51.35
Chat	68	64.1	46.79	52.7
Message board	87.2	80.8	63.46	70.27
Email	88.2	82.7	78.21	79.73

Part 9 – State of business in distance learning

Table 9.1 – Investments in 2017, by type of course

	Full distance learning		Blended		Open non-corporate		Open corporate		On-site	
	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)
Remained constant	71	36.22	52	33.99	64	42.67	21	29.17	84	29.89
Increased up to 25%	31	15.82	24	15.69	14	9.33	5	6.94	37	13.17
Increased 26%-50%	19	9.69	5	3.27	6	4	2	2.78	9	3.20
Increased 51%-75%	7	3.57	1	0.65	3	2	1	1.39	4	1.42
Increased 76%-100%	3	1.53	2	1.31	1	0.67	2	2.78	1	0.36
Increased over 100%	2	1.02	1	0.65	2	1.33	1	1.39	1	0.36
Decreased up to 25%	0	0	5	3.27	5	3.33	1	1.39	11	3.91
Decreased 26%-50%	4	2.04	2	1.31	1	0.67	2	2.78	3	1.07
Decreased 51%-75%	2	1.02	1	0.65	0	0	0	0	0	0
Decreased 76%-100%	1	0.51	1	0.65	2	1.33	0	0	0	0
Not available	33	16.84	31	20.26	34	22.67	22	30.56	83	29.54
Not informed	23	11.73	28	18.30	18	12	15	20.83	23	8.19
Total	**196**	**100**	**153**	**100**	**150**	**100**	**72**	**100**	**281**	**100**

Table 9.2 – Profits in 2017, by type of course

	Full distance learning		Blended		Open non-corporate		Open corporate		On-site	
	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)
Remained constant	54	27.55	48	31.37	47	31.33	16	22.22	77	27.40
Increased up to 25%	24	12.24	10	6.54	14	9.33	3	4.17	19	6.76
Increased 26%-50%	9	4.59	4	2.61	6	4	0	0	6	2.14
Increased 51%-75%	0	0	2	1.31	0	0	1	1.39	2	0.71
Increased 76%-100%	1	0.51	2	1.31	0	0	1	1.39	1	0.36
Increased over 100%	1	0.51	2	1.31	1	0.67	0	0	0	0
Decreased up to 25%	0	0	1	0.65	5	3.33	1	1.39	11	3.91
Decreased 26%-50%	0	0	0	0	4	2.67	0	0	2	0.71
Decreased 51%-75%	1	0.51	1	0.65	0	0	0	0	0	0
Decreased 76%-100%	0	0	0	0	0	0	0	0	0	0
Not available	69	35.20	48	31.37	49	32.67	31	43.06	104	37.01
Not informed	37	18.88	35	22.88	24	16	19	26.39	59	21
Total	**196**	**100**	**153**	**100**	**150**	**100**	**72**	**100**	**281**	**100**

Table 9.3 – Enrollments in accredited full distance learning courses in 2017, by administrative category

	Federal public		State public		For-profit private		Non-profit private		"S System"	
	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)
Remained constant	17	39.53	2	12.5	18	32.73	13	22.81	4	22.22
Increased up to 25%	4	9.30	2	12.5	14	25.45	12	21.05	2	11.11
Increased 26%-50%	4	9.30	2	12.5	9	16.36	7	12.28	3	16.67
Increased 51%-75%	2	4.65	2	12.5	3	5.45	2	3.51	1	5.56
Increased 76%-100%	2	4.65	2	12.5	2	3.64	2	3.51	1	5.56
Increased over 100%	4	9.30	4	25	0	0	0	0	1	5.56
Decreased up to 25%	2	4.65	1	6.25	1	1.82	9	15.79	0	0
Decreased 26%-50%	2	4.65	0	0	0	0	1	1.75	0	0
Decreased 51%-75%	0	0	0	0	1	1.82	0	0	0	0
Decreased 76%-100%	0	0	0	0	0	0	0	0	0	0
Not available	4	9.30	1	6.25	7	12.73	10	17.54	3	16.67
Not informed	2	4.65	0	0	0	0	1	1.75	3	16.67
Total	**43**	**100**	**16**	**100**	**55**	**100**	**57**	**100**	**15**	**100**

Table 9.4 – Enrollments in accredited blended courses in 2017, by administrative category

	Federal public		State public		For-profit private		Non-profit private		"S System"	
	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)
Remained constant	10	37.04	7	43.75	18	38.30	15	39.47	3	16.67
Increased up to 25%	6	22.22	2	12.5	6	12.77	2	5.26	7	38.89
Increased 26%-50%	1	3.70	1	6.25	2	4.26	1	2.63	2	11.11
Increased 51%-75%	0	0	0	0	1	2.13	2	5.26	0	0
Increased 76%-100%	0	0	0	0	0	0	0	0	1	5.56
Increased over 100%	1	3.70	1	6.25	1	2.13	0	0	1	5.56
Decreased up to 25%	0	0	1	6.25	3	6.38	3	7.89	0	0
Decreased 26%-50%	0	0	0	0	0	0	0	0	0	0
Decreased 51%-75%	1	3.70	0	0	1	2.13	0	0	0	0
Decreased 76%-100%	0	0	0	0	0	0	0	0	0	0
Not available	5	18.52	1	6.25	5	10.64	8	21.05	3	16.67
Not informed	3	11.11	3	18.75	10	21.28	7	18.42	1	5.56
Total	**27**	**100**	**16**	**100**	**47**	**100**	**38**	**100**	**18**	**100**

Table 9.5 – Enrollments in open non-corporate courses in 2017, by administrative category

	Federal public		State public		For-profit private		Non-profit private		"S System"		Government or public body	
	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)
Remained constant	3	15	6	46.15	14	33.33	14	43.75	6	21.43	3	37.5
Increased up to 25%	4	20	2	15.38	7	16.67	3	9.375	6	21.43	2	25
Increased 26%-50%	3	15	1	7.69	6	14.29	2	6.25	3	10.71	2	25
Increased 51%-75%	1	5	0	0	1	2.38	3	9.375	1	3.57	0	0
Increased 76%-100%	0	0	1	7.69	1	2.38	0	0	2	7.14	0	0
Increased over 100%	3	15	0	0	1	2.38	1	3.125	2	7.14	0	0
Decreased up to 25%	2	10	0	0	2	4.76	1	3.125	1	3.57	0	0
Decreased 26%-50%	0	0	0	0	1	2.38	0	0	0	0	0	0
Decreased 51%-75%	1	5	0	0	0	0	1	3.125	2	7.14	0	0
Not available	3	15	2	15.38	6	14.29	5	15.625	3	10.71	1	12.5
Not informed	0	0	1	7.69	3	7.14	2	6.25	2	7.14	0	0
Total	**20**	**100**	**13**	**100**	**39**	**100**	**30**	**100**	**26**	**100**	**8**	**100**

Table 9.6 – Enrollments in open corporate courses in 2017, by administrative category

	Federal public		For-profit private		Non-profit private		"S System"		Government or public body	
	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)
Remained constant	3	30	2	11.76	3	37.5	5	33.33	5	62.5
Increased up to 25%	2	20	4	23.53	2	25	0	0	0	0
Increased 26%-50%	0	0	0	0	1	12.5	1	6.67	1	12.5
Increased 51%-75%	1	10	2	11.76	0	0	0	0	0	0
Increased 76%-100%	0	0	4	23.53	0	0	1	6.67	0	0
Decreased up to 25%	0	0	1	5.88	0	0	0	0	0	0
Decreased 26%-50%	0	0	0	0	0	0	0	0	2	25
Decreased 51%-75%	0	0	0	0	0	0	2	13.33	0	0
Not available	0	0	0	0	0	0	0	0	0	0
Not informed	4	40	4	23.53	2	25	6	40		0
Total	**10**	**100**	**17**	**100**	**8**	**100**	**15**	**100**	**8**	**100**

Table 9.7 – Enrollments in on-site courses in 2017

	No. of institutions	Percentage (%)
Remained constant	102	36.30
Increased up to 25%	46	16.37
Increased 26%-50%	11	3.91
Increased 51%-75%	3	1.07
Increased 76%-100%	1	0.36
Decreased up to 25%	30	10.68
Decreased 26%-50%	2	0.71
Decreased 51%-75%	1	0.36
Not available	54	19.22
Not informed	31	11.03
Total	**281**	**100**

Table 9.8 – Investments planned for 2018, by type of course

	Full distance learning		Blended		Open non-corporate		Open corporate		On-site	
	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)
Will remain constant	47	23.98	36	23.53	47	31.33	15	20.83	76	27.05
Increase up to 25%	38	19.39	32	20.92	25	16.67	8	11.11	44	15.66
Increase 26%-50%	15	7.65	9	5.88	11	7.33	1	1.39	9	3.20
Increase 51%-75%	9	4.59	1	0.65	4	2.67	1	1.39	5	1.78
Increase 76%-100%	5	2.55	2	1.31	1	0.67	1	1.39	4	1.42
Increase over 100%	4	2.04	1	0.65	2	1.33	1	1.39	0	0
Diminuirá até 25%	2	1.02	0	0	0	0	2	2.78	2	0.71
Decrease 26%-50%	0	0	0	0	0	0	0	0	0	0
Decrease 51%-75%	0	0	0	0	0	0	0	0	1	0.36
Decrease 76%-100%	0	0	0	0	0	0	0	0	0	0
Not available	52	26.53	42	27.45	38	25.33	26	36.11	91	32.38
Not informed	24	12.24	30	19.61	22	14.67	17	23.61	49	17.44
Total	**196**	**100**	**153**	**100**	**150**	**100**	**72**	**100**	**281**	**100**

Part 10 – Acessibility survey results

Table 10.1 – Location by state of institutions participating in the Accessibility Census, compared to the general sample, in absolute numbers and percentage

State	General sample			
	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)
SP	67	19.7	6	16.2
MG	37	10.9	2	5.4
RJ	35	10.3	4	10.8
PR	28	8.2	11	29.7
RS	28	8.2	6	16.2
DF	24	7.0	1	2.7
SC	22	6.5	3	8.1
PE	15	4.4	0	0.0
CE	12	3.5	0	0.0
BA	10	2.9	0	0.0
MS	6	1.8	1	2.7
PA	6	1.8	0	0.0
PB	6	1.8	0	0.0
RN	6	1.8	1	2.7
ES	5	1.5	0	0.0
GO	5	1.5	0	0.0
MA	5	1.5	1	2.7
AM	4	1.2	0	0.0
SE	4	1.2	0	0.0
AL	3	0.9	0	0.0
RO	3	0.9	1	2.7
AP	2	0.6	0	0.0
MT	2	0.6	0	0.0
PI	2	0.6	0	0.0
AC	2	0.6	0	0.0
RR	1	0.3	0	0.0
TO	1	0.3	0	0.0

Table 10.2 – Administrative category of institutions participating in the Accessibility Census, compared to the general sample, in absolute numbers and percentage

Adm. category	General sample		Accessibility	
	No. of institutions	Percentage (%)	No. of institutions	Percentage (%)
Federal public educational institution	64	18.8	4	10.8
State public educational institution	30	8.8	2	5.4
Municipal public educational institution	3	0.9	0	0.0
For-profit private educational institution	97	28.4	21	56.8
Non-profit private educational institution	79	23.2	10	27
"S System" institution	37	10.9	0	0.0
NGOs and third sector	4	1.2	0	0.0
Government or public body	21	6.2	0	0.0
Other	6	1.8	0	0.0

Table 10.3 – Price charged by institutions participating in the Accessibility Census, in percentage

Monthly price	No. of institutions	Percentage (%)
More than R$ 3,500	1	2.70
R$ 101-R$ 250	4	10.81
R$ 251-R$ 500	10	27.03
R$ 501-R$ 1,000	2	5.41
Not informed	21	56.76

Table 10.4 – Level of agreement of respondents regarding support to special education, in 1 to 5 Likert scale

Type of support	Agreement
The VLE is equipped to guarantee the enrollment, retention and conclusion of students in the target audience of special education.	3.51
The institution has no difficulty hiring professionals specialized in the target audience of special education.	3.51
The accessibility policy is duly implemented and is known by everyone in the academic community.	3.54
The institution caters to the seven accessibility markers (attitude, architecture or structure, programmatic, methodological or pedagogical, instrumental, communication and digital).	3.54
The institution is prepared to guarantee the enrollment, retention and conclusion of students in the target audience of special education.	3.68

Table 10.5 – How institutions identify the target audience of special education, in absolute numbers and percentage

Identification method	No. of institutions	Percentage (%)
System with medical report	12	32.43
System, referrals or self-declaration	12	32.43
Referrals with medical report	3	8.11
Referrals without medical report	3	8.11
System without medical report	2	5.41
Self-declaration without medical report	1	2.70
Not applicable	1	2.70
Self-declaration with medical report	0	0

Table 10.6 – Specificities mapped by the institution, in absolute numbers and percentage

Specificity	No. of institutions	Percentage (%)
Disabilities (physical, hearing, visual, intellectual)	27	72.97
Specific functional disorders (ADD, dyslexia, dyscalculia, dysgraphia, dysortography)	19	51.35
Global development disorders (including autism spectrum)	17	45.95
High skills	12	32.43
Mental disorders in general	11	29.73
All of the above	3	8.11
Biopsychosocial disability	1	2.70

Table 10.7 – Existence of a specialized area for special education, in absolute numbers and percentage

Has special education area	No. of institutions	Percentage (%)
No	6	16.67
Yes	30	83.33

Table 10.8 – Training of special education professionals, in absolute numbers and percentage

Professional training	No. of institutions	Percentage (%)
Oriented guidelines	31	83.78
Courses	15	40.54
Lectures	13	35.14
Informational resources	9	24.32
No offer/no response	4	10.81
Other	2	5.41

Table 10.9 – Tech accessibility resources offered by the instituions, in absolute numbers and percentage

Resource	No. of institutions	Percentage (%)
Adapted testing	27	72.97
Computers with accessibility resources	23	62.16
Differentiated learning paths	16	43.24
High-definition scanners	13	35.14
Magnifying lenses	12	32.43
Tactile maps/models	10	27.03
Braille material	8	21.62
Enriched curriculum for gifted students	3	8.11
None	3	8.11
Screen reader	2	5.41
Computers with voice synthesizer	1	2.70
Subtitled videos	1	2.70
Adaptive books	1	2.70
Audio described material	1	2.70
Magnetic media material	1	2.70
Tests with videos in Libras	1	2.70
Assistive technology resource (adapted keyboard etc.)	1	2.70
Screen reading software	1	2.70

Table 10.10 – Resources available in the VLE, in absolute numbers and percentage

Resource	No. of institutions	Percentage (%)
VLE compatibility with accessible readers	22	59.46
Dyslexia fonts	15	40.54
Screen reader	11	29.73
Libras (interpreter)	11	29.73
Image description	11	29.73
Color contrast control	11	29.73
Video with external player	8	21.62
Font size control	3	8.11
Per demand	2	5.41
VLE not adapted	1	2.70

Table 10.11 – Human support offered to students, in absolute numbers and percentage

Human support	No. of institutions	Percentage (%)
Libras interpreter	24	64.86
SES professional	24	64.86
Reader/transcriber	19	51.35
Support professional	11	29.73
Audio describer	9	24.32
Personal assistant	9	24.32
Monitor	9	24.32
Caretaker	4	10.81
Orofacial articulator	3	8.11
None	3	8.11