



2016 Top Markets Report **Education** Country Case Study

Brazil

Over the past 15 years, Brazil has sent between 7,009 and 23,675 students annually to the United States for study. Between 2013/14 and 2014/15, the number increased by 78 percent. This jump is largely due to the Scientific Mobility Program. Budget constraints in Brazil, however, assure that the number of Brazilian students coming to the United States will decline probably as early as 2015/16.

Overall
Rank

6

Substantial increases in the number of Brazilians studying in the United States in each of the last four years are largely due to Brazil's Scientific Mobility Program. During the 2014/15 academic year, Brazil was the sixth leading source of students studying in the United States.¹

In 2011, the Brazilian government launched the Scientific Mobility Program (originally the Science without Borders Program) to support one-year, non-degree programs for Brazilian students to study abroad. The program has focused on the STEM fields (science, technology, engineering, and mathematics). The Scientific Mobility Program is part of a larger initiative to offer 101,000 Brazilian university students the opportunity to study abroad. The first cohort of Brazilian students arrived in the United States in January 2012 for the spring 2012 semester.²

Since the program's inception, the United States has been the single largest destination for participants. As of 2016, the Brazilian Government awarded approximately 27,800 scholarships for study in the United States as undergraduates and graduates. They have studied in almost 400 U.S. institutions in all 50 states and the District of Columbia³

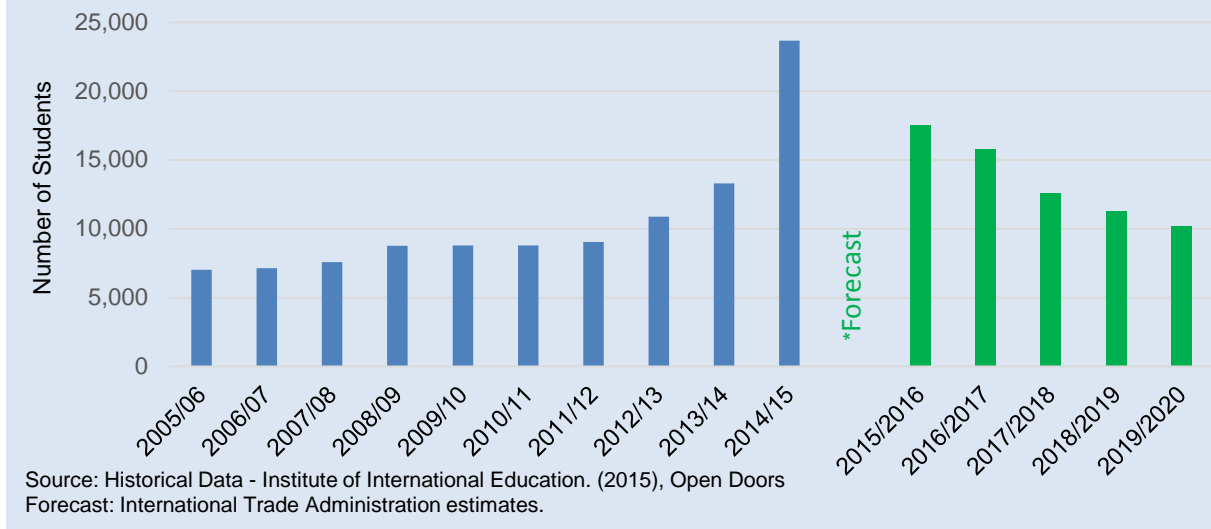
At this time, the Brazil Scientific Mobility Program is suspended. According to the Ministry of Education, there will be no new awards under this program in 2016. Students already placed abroad, however, will continue to receive Brazilian Government support until they finish the program.⁴

U.S. institutions interested in learning about the status of the program may contact the Institute of International Education, Scientific Mobility Program, at <http://www.iie.org/Programs/Brazil-Scientific-Mobility>.⁵

The total number of Brazilian students coming to the United States in 2014/15 saw spectacular increase of 78 percent to 23,675 students – far greater than the 13,477 forecasted in 2015. The suspension of the Scientific Mobility Program appears certain to reduce growth in the number of Brazilian students coming to the United States as early as 2015/16.⁶

The economic impact of all Brazilian students on the U.S. economy is significant, estimated by the U.S. Bureau of Economic Analysis to be \$408 million in 2014 (tuition, fees, and living expenses).⁷

**Figure 1: Brazilian Students in the United States
2005-2020***



In comparison, projections are that in 2016, 10 million students will be enrolled in domestic universities, many of whom will be supported by Brazilian federal government loans (e.g. FIES loans, with which the students finance up to 100 percent of their education, and PROUNI loans, through which public school students finance up to 50 percent of their higher education expenses).

Overview of Global Export Market Opportunities in Education for Brazil

In 2014/15, 29 percent of Brazilian students in the United States were undergraduates. Graduate students numbered just over 17 percent of Brazilian students in the United States. Students in optional practical training accounted for 4.7 percent while “other” accounted for almost 50 percent. Much of this “other” category is intensive English language training.

Of all Brazilian students, 30.2 percent study STEM subjects, and 12.1 percent study business/management.

A significant number of Brazilian students need intensive English training before entering their one-year academic program. Intensive English language programs attracted 9,063 Brazilian students in 2012/13 and 14,070 in 2013/14. The end of the Scientific Mobility Program, however, will lead to less funding for this English-language training.⁸

Future Growth/Opportunities

In the near-term, the number of Brazilian students is likely to decline. The primary reason is the suspension of the Scientific Mobility Program (also called “Science without Borders”). Other important limiting factors include economic uncertainty in Brazil and the need for English language proficiency in U.S. colleges and universities.

Other factors potentially dampening the demand for U.S. education in Brazil include growing competition from other countries. Brazilian students show strong interest in exchange programs rather than going abroad for all undergraduate coursework, in large part because equivalency is sometimes not granted by Brazilian universities for coursework completed outside Brazil.

Another promising avenue for U.S. colleges and universities would be to form a partnership with a Brazilian university to participate in the Brazilian Government’s National Program for Technical Courses (PRONATEC), a \$35 billion program established in 2011 to funnel government investments into technical schools and courses for high schools students and adults.

Since its inception, PRONATEC has funded technical and vocational courses for over eight million students and expects to fund an additional 12 million students’ courses for the second phase. PRONATEC only funds courses offered in Brazil. Foreign

universities may take part in it by establishing partnerships with Brazilian higher education institutions. The Brazilian National Confederation of

Industry, through its technical school, is also helping the government to offer these courses.

¹ IIE Open Doors 2015 Report, Fast Facts.

² Brazil Scientific Mobility Program, Fall 2014 Overview (Institute of International Education, Fall 2014)

³ CAPES web site on the Science without Borders Program, on <http://www.cienciasemfronteiras.gov.br/web/csf/bolsistas-pelo-mundo> (accessed March 15, 2016); Brazil Scientific Mobility Program, Fall 2014 Overview (Institute of International Education, Fall 2014)

⁴ Email from the U.S. Embassy in Brazil to ITA, February 12, 2016.

⁵ Education and Training Services Resource Guide, Global Education Team, U.S. Department of Commerce (2016), article on Brazil.

⁶ IIE, Open Doors 2015, Fast Facts.

⁷ Bureau of Economic Analysis, International Services, October 2015, Table 2.3 Brazil and IIE, Open Doors Fact Sheet: Brazil (2015)

⁸ Institute of International Education (IIE), Open Doors Report, International Students: Academic Level by Place of Origin and Fields of Study by Place of Origin; Brazil Scientific Mobility Program, Fall 2014 Overview (Institute of International Education, Fall 2014); Brazil Scientific Mobility Program, Intensive English Program, <http://www.iie.org/Programs/Brazil-Scientific-Mobility/Current-Students/Intensive-English-Program#.VxkfZnErKUK>