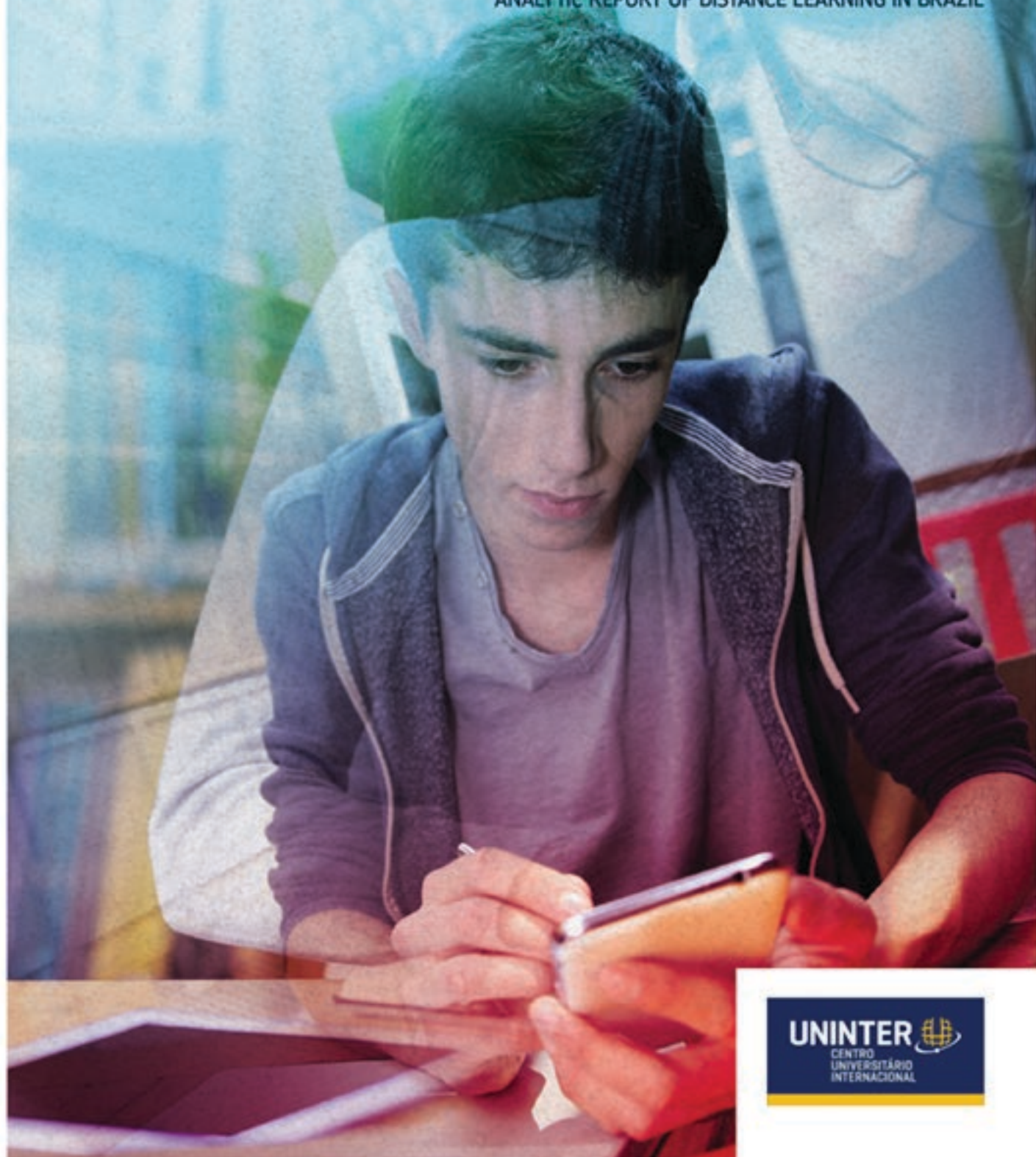


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ANALYTIC REPORT OF DISTANCE LEARNING IN BRAZIL



Analytic Report of Distance Learning in Brazil

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A word from the president

“In God we trust. All others must bring data.” This saying, usually attributed to W. Edwards Deming (1900-1993), creator of the concept of quality control, is the best justification for gathering the numbers concerning such an important and complex subject. It is useful both for understanding our current social and scientific context and assessing the progress or setback of a given sector, as well as for trying to foresee what is to come. One must refer to quantitative data in order to be able to efficiently discuss what distance learning (DL) represents to a nation such as Brazil, because this topic involves fundamental aspects of inclusion and personalized learning: How many people with special needs or who live far away from urban centers (where important educational institutions are usually located) is distance learning benefitting? And what about those who need a more flexible study schedule? How many people who wish to “learn independently” in order to change profession, or who seek “super specialized” knowledge, available only at foreign institutions, is this modality contemplating? And what about those who wish to simply enjoy literary, scientific or musical works online? Because it presents these positive, measurable and analyzable features among many others, distance learning has the potential to grow faster than on-site learning in Brazil and abroad.

Now in its 8th annual edition, this Brazilian Census for Distance Learning is a service that Abed – the Brazilian Association for Distance Learning – provides to all those interested in the social and economic development of Brazil through educational activities, both formal and informal, in the academia (schools and higher education institutions) and the corporate world (businesses, governments, unions, NGOs, among others). As a scientific society, Abed is serious about providing basic data to inform the important works of national and international scholars, managers, educational entities, businesses and government bodies.

Abed also contributes with its semi-annual scientific journal (the *Revista Brasileira de Aprendizagem Aberta e a Distância*, or Brazilian Journal of Open and Distance Learning), which publishes and translates some of the most noted new writings on distance learning edited abroad, as well as the organization of our academic assemblies: the Abed International Congress on Distance Learning (Ciaed, in Portuguese), with over 2.000 participants and more than 400 papers submitted for review each year, and the National Seminar (Senaed), with its relevant discussions on the achievements of distance learning in the country. None of this would be possible without the significant support of Brazilian distance learning entities, which honor each one of our members by sponsoring the publications and events promoted by Abed.

I have the pleasure to announce that this Brazilian Census for Distance Learning reveals an increased number of participants in the survey and confirms the growth in the number of institutions and companies working in distance learning in 2015. The participating institutions have also declared their intention to increase their investments in this modality, notably in strengthening hybrid learning, in 2016.

There is still plenty of room to grow and experiment, in terms of offer of programs, types of courses and methodologies, as well as administrative and technological innovation. Please receive my warmest wishes that this Census will help your organization, whether educational or supplying, to find its space within the current picture of distance learning in Brazil and to imagine all the places it can still explore.

Fredric M. Litto

President, ABED



Executive summary

The **2015 Brazilian Census for Distance Learning: Analytical Report on Distance Learning in Brazil** aims to provide quantitative information and qualitative analyses on the distance learning activities in Brazil to all those interested, covering all educational levels of the formal education system, informal teaching initiatives and the activities of institutions that supply products and services in the segment. 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 distance learning in Brazil. Its analyses, instead, aim to present a picture of market trends in regards to the categories of institutions that offer distance learning, the types of courses offered, the audience they reach, the execution of distance learning activities, their administrative organization and even profitability, necessary investments and challenges inherent to this modality. Below, we present the most relevant results of this Census.

We begin by approaching the sample:

- The number of respondents increased, mainly among for-profit private institutions (a 98.28% increase) and educational institutions that started additionally supplying products and services (from 17 in 2014 to 40 in 2015 – an increase of more than 100%).

On the profile of educational institutions:

- Distance learning is present throughout the country, in state capitals and inland cities, with institutions from every region and state in the country (we see a concentration of 42% of institutions headquartered in the Southeast, notably São Paulo, with 22%).
- Only 79 of the 368 institutions that participated in the 2015 Brazilian Census for Distance Learning perform activities outside their states of origin, with an average concentration of 59 hubs per institution.
- The courses are offered in every educational level and knowledge area, highlighting the 1,079 offers of extension courses and the 608 accredited full distance learning courses in Applied Social

Sciences. Among blended courses, the preferred knowledge area is Humanities, with 1,389 course offers registered.

- Educational institutions have, on average, 1,000-4,999 students, while some may have less than 100 and more than 500,000.
- According to the participants' opinion, distance learning requires higher levels of administrative and technological innovation, and technological and student support infrastructure than on-site learning.

On the profile of distance learning students:

- 53% are women.
- 49.78% are 31-40 years old.
- Approximately 70% of non-profit and for-profit private institutions and federal public institutions have a majority of students that study and work.
- Most enrollments in full distance learning and blended courses are in teaching, with 148,222 students enrolled in teaching degree courses, 134,262 in double qualification (which grants both a teaching and bachelor's degree in the same course), and 410,470 in blended teaching degree courses.
- Open courses were taken by 1,880,165 students in professional initiation courses and 137,092 students in corporate courses in the same category; 1,001,819 students in operational training and 137,092 in corporate courses of the same modality.
- The 2015 Brazilian Census for Distance Learning accounted for 5,048,912 students. Of these, 1,108,021 were in accredited full distance learning and blended courses, 3,940,891 in corporate or non-corporate open courses. There were 1,180,296 more students enrolled than in 2014.

Dropout rates:

- The dropout rates reported in distance learning courses are higher than in on-site courses (accredited full distance learning courses have the highest rates). The 2015 Brazilian Census for Distance Learning recorded a dropout rate of 26%-50% in 40% of the institutions that offer accredited full distance learning courses.

- Institutions point to the *time* factor as the most relevant dropout reason, followed by the *finance* factor.
- Institutions that offer full distance learning courses see as non-justifiable, since the students can come back at any time.

Distance learning professionals:

- Most professionals involved in distance learning are tutors and teachers. We counted 29,380 tutors and 18,769 teachers in the period surveyed by this Census (in the 2014 Brazilian Census for Distance Learning, we counted 17,692 tutors and 11,074 teachers).
- The most common pay range for both these professionals is R\$ 31 to R\$ 45 (per hour).
- Most of the production of text and audiovisual content and complex technological resources was carried out autonomously within the institutions. Yet, there were establishments that used free content or content totally or partially produced by third parties.
- Autonomy is highest when it comes to text production, followed by audio and video and, finally, technological resources.

Distance learning business management:

- Over 50% of institutions of all administrative categories have a centralized management structure.
- Most institutions presented stable levels of investment, profitability and enrollments in 2015. The percentage of institutions that showed an increase in these segments was slightly higher than that of institutions who saw a decrease.
- There is a favorable forecast for increased investments in 2016: 24.91% of institutions intend to increase their investments, while 20.48% intend to maintain them, and 6.35% intend to reduce them.
- Apparently, investments will be directed mainly towards blended courses. Institutions declared there will be a reduction in investments in this type of course.
- Investments were mainly directed at content (40.58%), technology and innovation (37.01%), new courses (36.71%) and training (25.02%) in accredited full distance learning courses.

- As for blended courses, 30,11% of institutions prioritized training.
- When compared to that of public institutions, the investments made by non-profit and for-profit private institutions in the categories presented in this Census were higher.

Classroom organization in distance learning:

- There are courses with less than 30 students and courses with more than 500 students. However, most classes have 31 to 50 students.
- The workload of the courses varies:
 - ▶ from 2 hours to more than 700 hours in open courses;
 - ▶ from less than 20 hours to more than 60 hours in blended disciplines;
 - ▶ from less than 360 hours to more than 700 hours in accredited full distance learning courses.
- It is common to offer on-site and/or online support to students.
- More than 60% of institutions opt for open source learning management systems, customized within the institution, for all types of courses.
- Learning management systems integrated to the institutions' academic systems fall below 50%.
- Approximately 43% of institutions implemented cloud-based learning management systems.
- In all types of distance courses, the use of all types of communication with the student, from content distribution to learning repositories, including physical books and libraries, is superior to that of on-site courses.
- On-site courses are already applying distance learning resources, although to a lesser degree.

Supplying institutions:

- The institutions in this category come from all regions of the country (more specifically, 14 states) – 58% are from the Southeast (32% from São Paulo).
- 39% of the sample were micro businesses, while 35% were large businesses.
- The main activity of these establishments is concentrated on the supply of contents, training, consulting and systems maintenance.

- For 44% of these organizations, distance learning corresponds to 76%-100% of their income.
- Only 12 companies declared receiving some form of investment or financial support, whether public or private.
- 23% did not record an increase in number of clients in 2015.
- The main clients of supplying institutions are for-profit private institutions – the 2015 Brazilian Census for Distance Learning counted 40 supplying institutions that cater to that administrative category. In second came institutions of the “S System”¹, served by 19 suppliers.
- Software and content licensing tends to be standard copyright, with a very small practice of alternative licensing.
- Among the concerns of supplying companies, what stands out is competition, production cost, reduced demand and the client’s lack of understanding of their own needs.

¹ National Learning System, or SNA: Senai, Sesi, Senac, Senat, Sebrae etc.

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Parte 1

Overview of the Brazilian Census for Distance Learning



1.1 Objective and scope

The **Brazilian Census for Distance Learning: Analytical Report on Distance Learning in Brazil**, currently in its eighth edition, consists in an effort to understand the scenario of distance learning (DL) in Brazil and provides related segments and academia with a mapping of the main trends in this industry.

The **2015 Brazilian Census for Distance Learning** aims to provide quantitative and qualitative information on the distance learning activities in Brazil to all those interested, covering all educational levels of the formal education system, informal teaching initiatives and the activities of institutions that supply products and services in the segment. 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 scenario of distance learning in Brazil. Its analyses, instead, aim to present a picture of market trends in regards to the categories of institutions that work with the distance learning modality, the types of courses offered, the audience they reach, the execution of distance learning activities, their organization and even profitability, necessary investments and challenges inherent to this modality.

1.2 Criteria for survey participation

Participants in the 2015 Brazilian Census for Distance Learning included:¹

- Institutions accredited by the Brazilian National Education System – Ministry of Education (Sistema Nacional de Educação – Ministério da Educação, or MEC) and the National Education Council (Conselho Nacional de Educação – CNE) in all levels: primary, technical, undergraduate and graduate.
- Formal and informal educational institutions who offer open courses.
- Institutions operating in corporate learning.

- Companies that supply distance learning products and services.

The institutions contacted develop direct and indirect actions in distance learning, as detailed below.

1.2.1 Direct actions

Direct actions are those that specifically cater to the public interested in distance learning, such as full distance learning courses, blended or hybrid courses, open courses and corporate open courses.

- **Full distance learning courses:** These are distance learning courses offered by institutions accredited or authorized by a federal, state or municipal regulatory body, in which the student's presence is required exclusively for learning evaluations.
- **Blended courses:** According to current Brazilian legislation (Law n. 9.394, of December 20th, 1996 – called the “National Education Guidelines Act”, art. 81 – Brasil, 1996, Decree n. 5.622, of December 19th, 2005 – Brasil, 2005, Order n. 4.059, of December 10th, 2004 – Brasil, 2004), a *blended course* must have up to 20% of its workload offered in distance learning mode.
- **Open distance learning courses (non-corporate):** These are distance learning courses that are not regulated by an educational body, are offered openly to the general public, and may or may not be linked to an institution.
- **Open corporate learning courses:** These are distance learning courses that are not regulated by an educational body, designed to cater to the training needs of employees or clients of an organization.

1.2.2 Indirect actions

Indirect actions are initiatives that result in products (learning objects, texts, crude content or pedagogically treated content etc.) or services (website hosting, tutoring, content production, among others) that enable direct actions or make them more effective.

¹ Membership to the Brazilian Association for Distance Learning (Abed) is not required for participation in the Census.

1.3 Invitations to the institutions

Participation in the Abed Census depends on the collaborative and voluntary attitude of each institution. Abed works with available sampling, where the data collected establish the limits of the analysis.

1.3.1 Invitations sent

Abed contacted 1,145 institutions via email newsletter and an open invitation published on the association's website, with information about the survey for all establishments operating in distance learning. The selection of institutions contacted to compose the 2015 Brazilian Census for Distance Learning was carried out by Abed from a survey of the entities working in the distance learning field based on the sources listed below.

Educational institutions

- List of educational institutions accredited by the Brazilian National Education Council (CNE) to offer distance learning courses at undergraduate and graduate levels.
- List of institutions accredited by State Education Councils (CEE) to offer distance learning courses at the primary, youth and adult education, and vocational levels.
- List of institutions cited in the Educational Census that offer distance learning 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 (Sistema Único de Saúde – Unasus).

Corporate entities

- Companies with notorious projects in corporate distance learning.
- Companies cited in recent academic studies as being involved with the distance learning modality.
- Companies listed by the Ministry of Development, Industry and Foreign Trade (Ministério do

Desenvolvimento, Indústria e Comércio Exterior – MDIC) for having projects in corporate learning.

- Companies recommended by class-representing institutions, such as the Brazilian Association of Corporate Learning (Associação Brasileira de Educação Corporativa – Abec) and the Brazilian Association of Human Resources (Associação Brasileira de Recursos Humanos – ABRH).

Market entities

- Companies that stand out in the distance learning market – suppliers and service providers of institutions or companies that develop distance learning actions.

1.3.2 Monitoring and completion of questionnaires

Registrations were monitored daily, as well as the responses obtained, in order to avoid the duplicity of responses. Moreover, the responses that contained doubts and inconsistencies were addressed promptly.

All questionnaires sent by the institutions were analyzed prior to data processing (that is, the analysis of 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 questionnaire for a new verification.

The questionnaire of the 2015 Brazilian Census for Distance Learning was responded by 409 institutions. It was necessary to remove 40 blank questionnaires from the database, and 1 questionnaire that contained answers that were not compatible with the distance learning reality in its segment (this institution was contacted about the issue). In total, the Census takes into account 368 responses – 339 educational institutions that carry out direct actions, and 69 supplying institutions, which carry out indirect actions, of which 40 are also educational. This sample is significantly larger than those of previous years.

Chart 1.1 – Number of educational institutions participating in the Brazilian Census for Distance Learning in the past 4 years

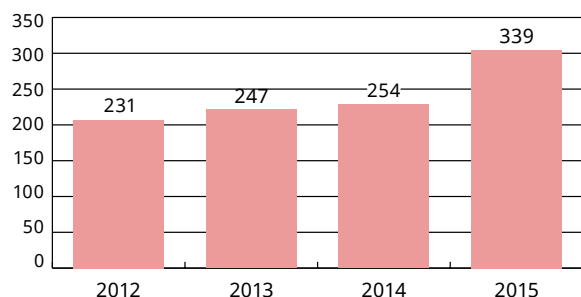
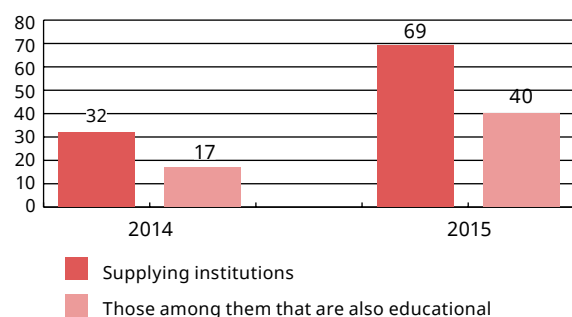


Chart 1.2 – Number of educational-supplying institutions participating in the Brazilian Census for Distance Learning in the past 2 years



1.4 Survey methodology

The methodology of the 2015 Brazilian Census for Distance Learning survey is largely similar to that used in previous editions. The original questionnaire has been simplified, so as to ensure that each question corresponds to a response and that cross-checking data was made easier. The questionnaire² was created on **Google Forms**³, and the data were cross-checked according to the relevance of analyzing different data, according to administrative category or type of course offered.

² The sections of the questionnaire regarding institutions with different modalities of direct and indirect actions were analyzed separately.

³ A tool for creating and applying survey forms, available for free with a Google account.

The data were analyzed quantitatively and qualitatively and organized into tables and charts in order to identify market trends and distance learning practices in Brazil.

1.4.1 Survey variables

The survey variables contemplated the profile of educational institutions, distance learning students and professionals. The information assessed included the administrative profile of educational institutions, as well as their business profile, with studies on their investments, profitability, and increase or decrease in the number of enrollments by type of course offered. The way distance learning activities were carried out was also analyzed, in regards to content offer, technological resources, student assistance and distance learning material production teams.

As for supplying institutions and companies, we present their profile, investment sources and client base.

In this edition, we have included a few questions regarding on-site learning activities carried out by the institutions participating in the Census, as a reference for the comparative analyses of their audience profile, investments, types of resources offered and challenges of the different teaching modalities. We have obtained consistent data to understand the peculiarities of full distance learning, on-site and blended courses.

Questions using a Likert⁴ scale were included regarding the opinion of supplying and educational institutions on their everyday challenges. This method was also used to survey the opinion of educational institutions regarding the issue of dropouts in the different types of distance and on-site courses.

⁴ Psychometric response scale described by Rensis Likert, commonly used in opinion surveys. The 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.

1.5 Commitment to participant institutions privacy

An agreement was signed with all participants regarding our commitment to keep the identity of each respondent institution confidential. The participants identified themselves, but no results may be specifically associated to any institution participating in the 2015 Brazilian Census for Distance Learning.

References

BRASIL. Decreto n. 5.622, de 19 de dezembro de 2005. **Diário Oficial da União**, Poder Executivo, Brasília, DF, 20 dez. 2005. Disponível em: 1º ago. 2016. Disponível em: <http://www.planalto.gov.br/ccivil_03/_ato2004-2006/2005/decreto/d5622.htm>. Acesso em: 1º ago. 2016.

_____. Lei 9.394, de 20 de dezembro de 1996. **Diário Oficial da União**, 23 dez. 1996. Disponível em: <http://www.planalto.gov.br/ccivil_03/leis/L9394.htm>. Acesso em: 1º ago. 2016.

BRASIL. Ministério da Educação. Portaria n. 4.059, de 10 de dezembro de 2004. **Diário Oficial da União**, Poder Executivo, Brasília, DF, 13 dez. 2004. Disponível em: <http://portal.mec.gov.br/sesu/arquivos/pdf/nova/acs_portaria4059.pdf>. Acesso em: 1º ago. 2016.

*Profile of
educational
institutions
participating in
the 2015 Brazilian
Census for Distance
Learning*

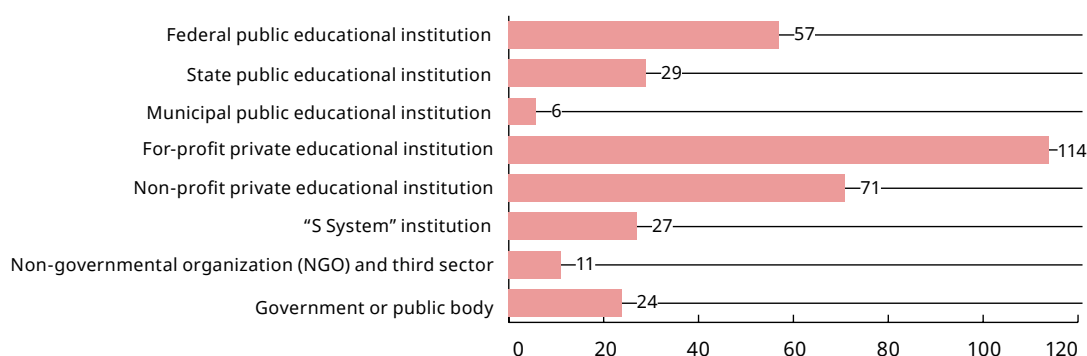


In this edition of the Brazilian Census for Distance Learning, 339 educational institutions have contributed their responses. Below, these establishments, their location, number of students and courses offered are presented.

2.1 Distribution of the sample by administrative category

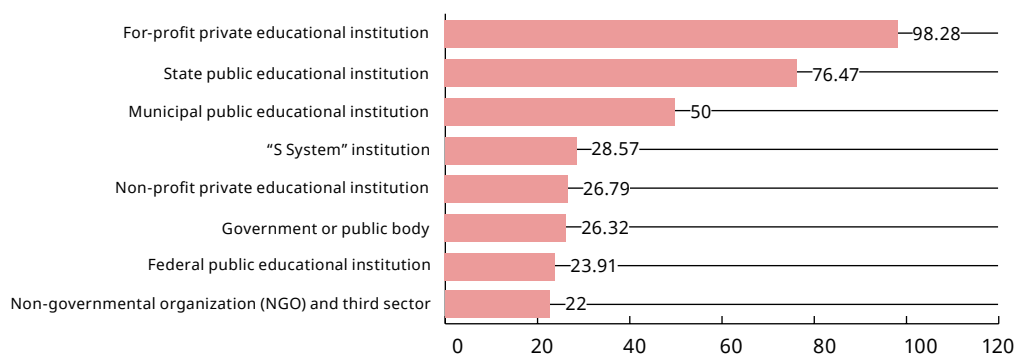
Every administrative category consulted in previous Censuses have participated in this edition: federal, state and municipal public institutions, for-profit and non-profit private educational institutions, “S System” institutions (Sesi, Sebrae, Senac, Senai, etc.), non-governmental organizations (NGOs), third sector and public bodies:

Chart 2.1 – Profile of educational institutions, by administrative category (in absolute numbers)



The increase in number of participants was more significant among for-profit private institutions (98.28% – from 58 to 114 institutions) and state public institutions (76.47% – from 17 to 29). The increase in participation among NGOs, third sector and municipal public institutions has also been significant in percentage terms, despite its low totals – 11 and 6, respectively:

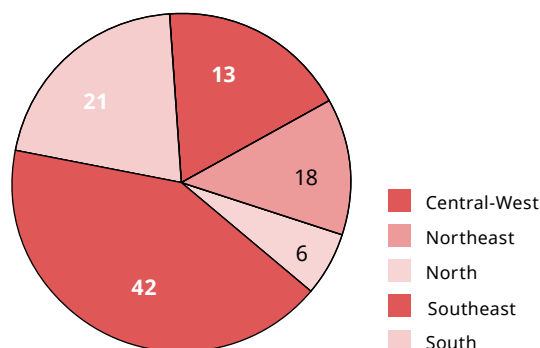
Chart 2.2 – Increase in the number of participating educational institutions (%)



2.2 Location of distance learning educational institutions

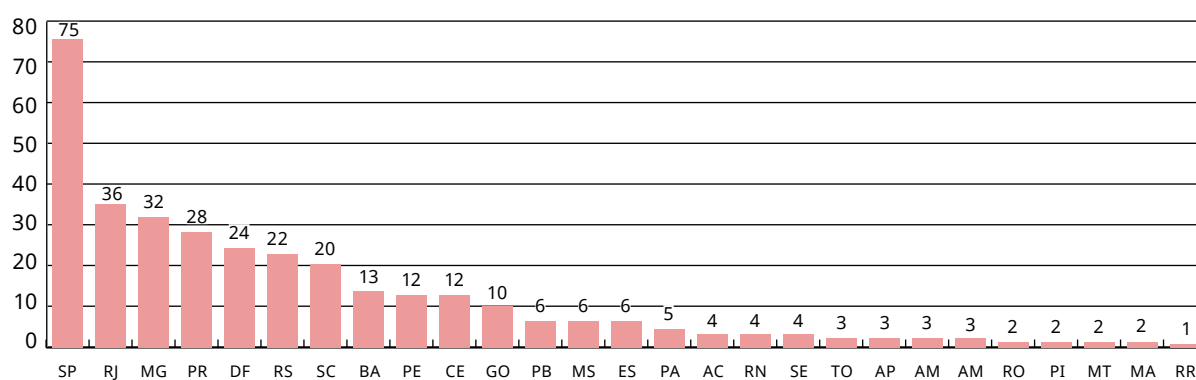
Institutions of every Brazilian region participated, as shown by the chart below:

Chart 2.3 – Educational institutions, by region (%)



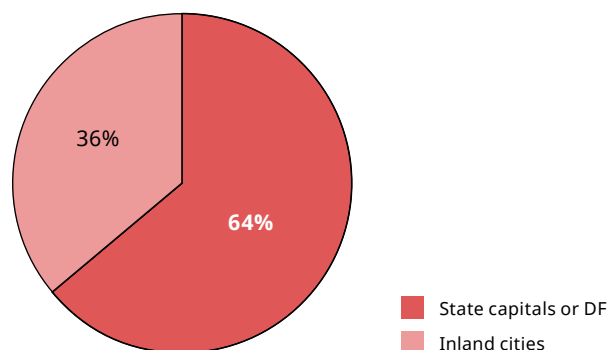
Among these regions, there were participants from 27 states, distributed as per Chart 2.4:

Chart 2.4 – States of origin of educational institutions (in absolute numbers)



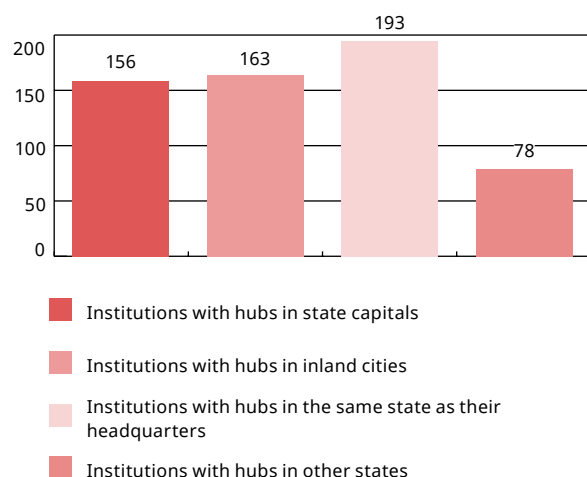
Approximately 2/3 of the respondent institutions, that is, 216 establishments, said they have headquarters in a state capital or in the Federal District (DF), and 1/3 (121) in inland cities:

Chart 2.5 – Educational institutions headquartered in state capitals, DF or inland cities (%)



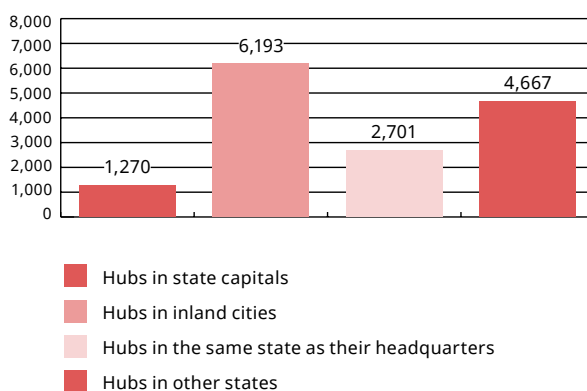
Among the 339 institutions that worked with distance learning, 158¹ said they rely on hubs in state capitals or the DF, while 164 said they have hubs in inland cities. In terms of national coverage, the data show that 194 establishments have hubs in the same state as their headquarters, while only 79 have hubs in other states:

Chart 2.6 – Average hubs by institution, in state capitals or the DF, or in the same state as their headquarters or in other states (in absolute numbers)



As for the number of hubs, the Brazilian Census for Distance Learning counted 1,270 hubs in state capitals, 6,193 in inland cities, 2,701 in the same state as the institution's headquarters and 4,667 in other states:

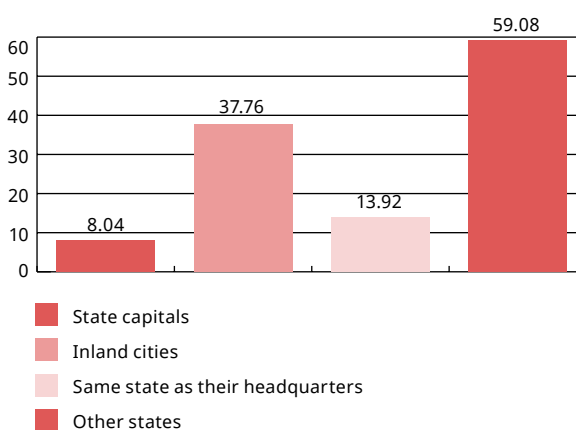
Chart 2.7 – Total hubs in state capitals, inland cities, in the same state as their headquarters or in other state (in absolute numbers)



¹ Not all institutions have hubs. In this case, this Census account only for positive responses. Other answers were "Not applicable", "Unknown", "Not informed".

The average number of hubs by institution is 8.04 in capitals, 37.76 in inland cities, 13.92 in the same state as the institution's headquarters and 59.08 in other states:

Chart 2.8 – Average hubs by institution, in state capitals or the DF, in the same state as their headquarters or in other state (in absolute numbers)

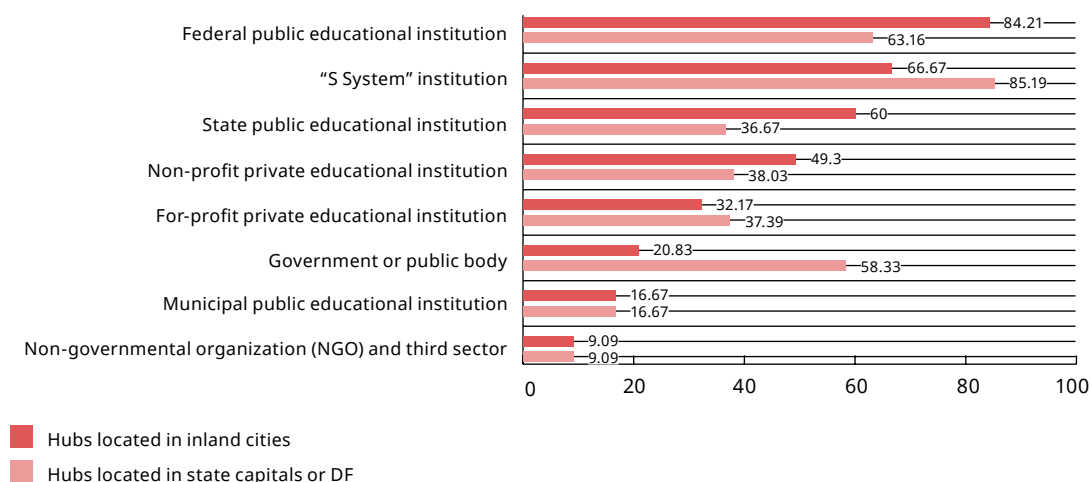


The existence of hubs in cities other than state capitals shows how distance learning is important in order to provide access to education for people living in the most remote regions of the country. The existence of institutions that can offer distance learning in states other than their headquarters shows how the distance learning modality allows them to broaden their reach.

The figures collected in this Census revealed that opening hubs in states other than the institution's headquarters is more common than opening them in inland cities of the same state. This index shows that there seem to be factors that limit the expansion of institutions to other states. If we consider that the average number of hubs in states other than their headquarters per institution (59.08) is considerably higher than the average of hubs in the same state (13.92), we can infer that the offer of courses in other federal units depends on large institutions, with room to accredit and manage large numbers of hubs. Many institutions are not even planning to expand beyond their states of origin.

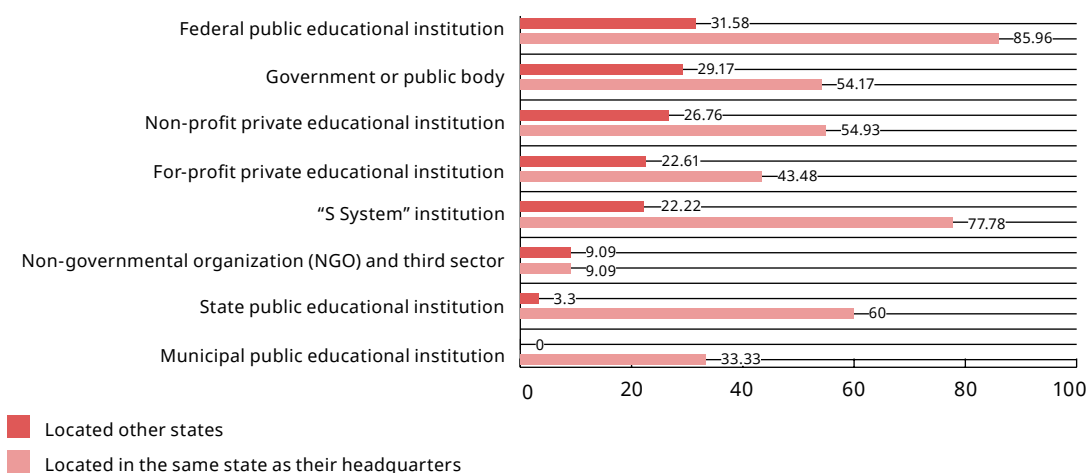
Due to the percentage of institutions with hubs in inland cities by administrative category, it's possible to see that the administrative categories that most devote efforts to service students in these regions are respectively: federal public institutions (84.21%), "S System" institutions (66.67%) and state public institutions (60%). Among private institutions, those that are non-profit have a higher percentage of hubs in inland cities (49.3%) than those that are for-profit (32.17%):

Chart 2.9 – Institutions with hubs in inland cities, by administrative category (%)



As for the presence in states other than their headquarters, the administrative categories with the highest percentage of institutions were: federal public institutions (31.58%), public bodies or government (29.17%), non-profit private institutions (26.76%), for-profit private institutions (22.61%) and "S System" institutions (22.22%):

Chart 2.10 – Institutions with hubs in states other than their headquarters, by administrative category (%)

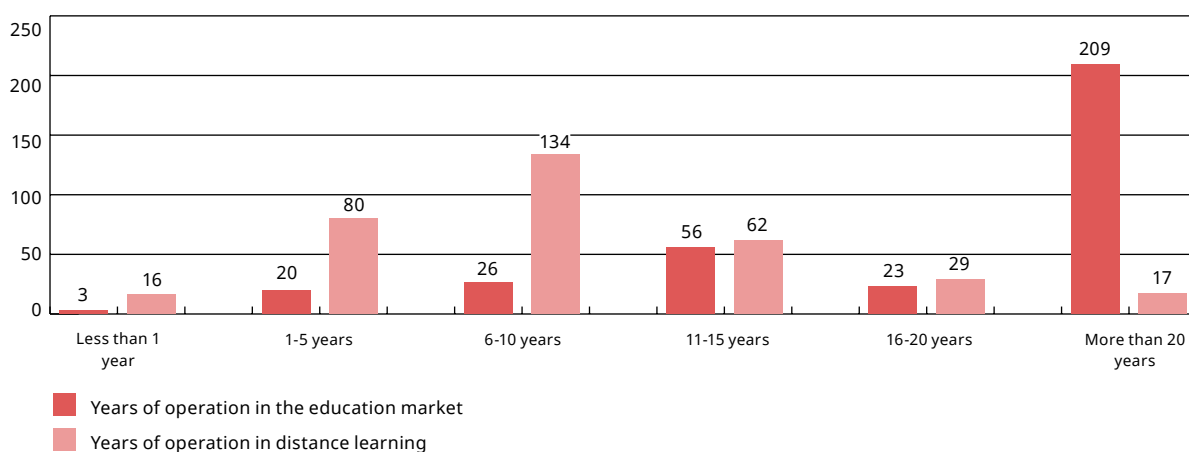


2.3 Distribution of educational institutions by years of operation in the education field

The results regarding years of operation of respondent institutions revealed that most of them (209) have been in the education market for over 20 years. A similar number of institutions have started operating

in the education field in general (62 institutions) and in distance learning (56 institutions) 11 to 15 years ago. The large increase in the number of institutions operating in distance learning happened 6 to 10 years ago, with the entrance of 134 institutions in this field. This number has been decreasing in the past 5 years, with the appearance of 80 institutions in distance learning, and 16 in the year previous to this Census:

Chart 2.11 – Years of operation of educational institutions in education in general and in distance learning (in absolute numbers)



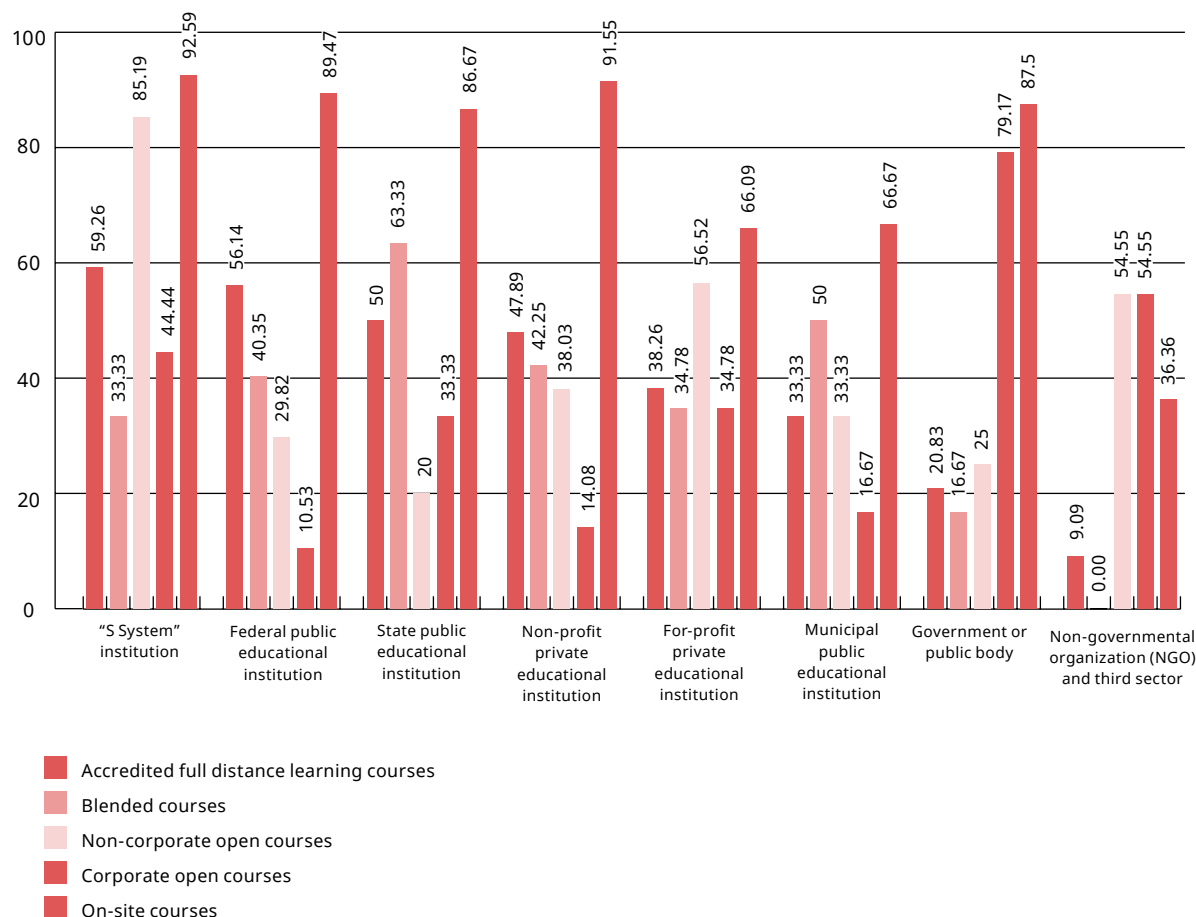
2.4 Distribution of educational institutions in distance learning by courses offered

In the 2015 Brazilian Census for Distance Learning, most administrative categories offered on-site courses as well as every different type of course that can be offered at a distance, that is, accredited full distance learning courses, blended courses, non-corporate and corporate open courses. The data show that there is a clear preference in the offer (by category):

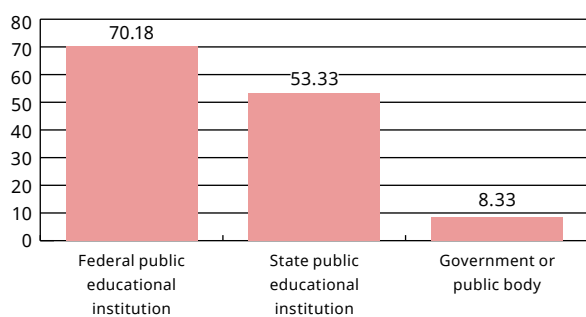
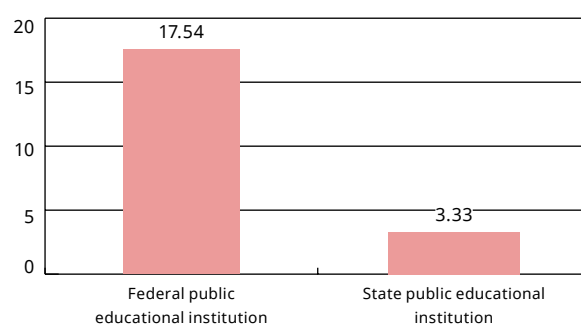
- NGOs and the third sector offered the least on-site courses (36.36% of respondent institutions offered them), and concentrated their efforts in open corporate and non-corporate courses (54.55% of institutions offer these types of courses).
- Over 60% of for-profit private institutions and municipal public institutions said they offer on-site

courses, and over 85% of federal and state public and “S System” institutions, non-profit private and public bodies said they have experience in this modality.

- As for distance courses, the administrative categories that offered the most accredited full distance learning courses were “S System” institutions (59.26%), federal (56.14%) and state (50%) public institutions.
- Blended courses were offered mostly by state and municipal public institutions (63.33% and 50% of them offer this type of course, respectively).
- Non-corporate open courses were offered mostly by “S System” institutions (85.19%) and for-profit private institutions (56.52%).
- Finally, corporate open courses were offered mostly by public bodies (79.17%), NGOs and the third sector (54.55%) and “S System” institutions (44.44%).

Chart 2.12 – Types of courses offered, by administrative category (%)

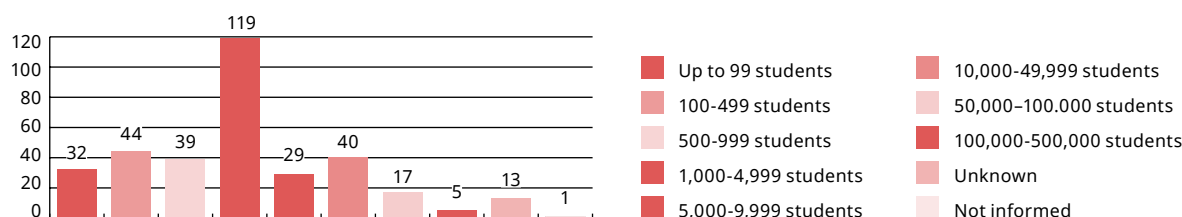
Among the public institutions that offered UAB courses, we have the following scenario: federal public institutions (70.18%), state public institutions (53.33%) and municipal public institutions (8.33%). As for Unasus: federal public institutions (17.54%) and state public institutions (3.33%):

Chart 2.13 – Public institutions that participate in the UAB (%)**Chart 2.14** – Public institutions that participate in Unasus (%)

2.5 Distribution of educational institutions by number of students

The vast majority of institutions who participated in the 2015 Brazilian Census for Distance Learning said they have between 1,000 and 4,999 students. There were also institutions with less than 99 students and even more than 500,000 students among the respondent establishments:

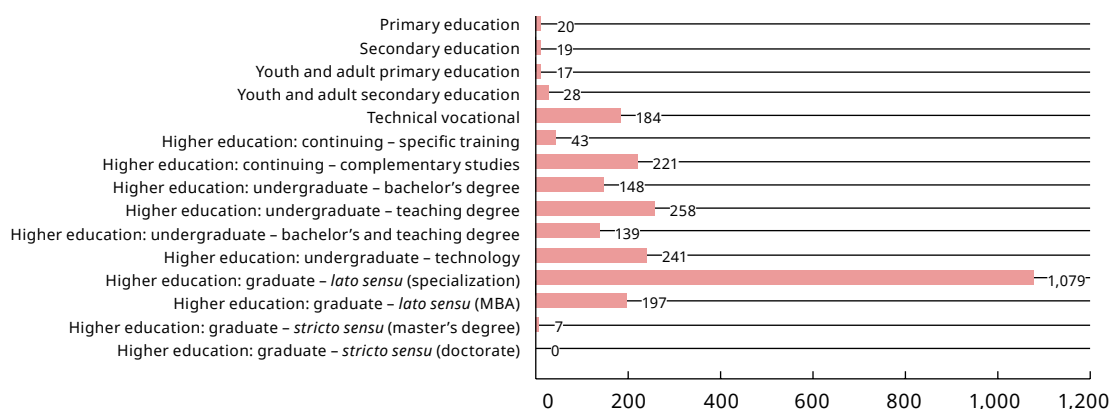
Chart 2.15 – Educational institutions by type of classroom organization (in absolute numbers)



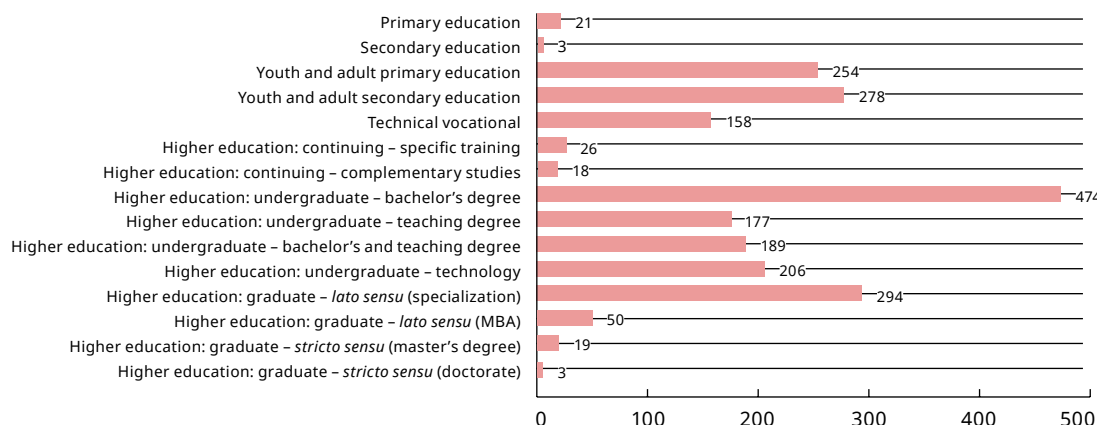
2.6 Distribution of educational institutions by accredited full distance learning courses offered

In regards to the offer of accredited full distance learning courses, by academic level, with all offers registered in the 2015 Brazilian Census for Distance Learning combined, the significant majority of courses offered were specialization courses, which reinforces the role of distance learning in continuing education. As for other levels of higher education (except for doctorate, which has no courses), the offer varied from 43 to 241 courses per level, throughout the country:

Chart 2.16 – Offer of accredited full distance learning courses, by academic level (in absolute numbers)



Among blended courses, most of the offer by academic level corresponds to bachelor's degree courses, with 474 courses. There is a regular offer of courses for other levels, which varies from 23 to 294 courses:

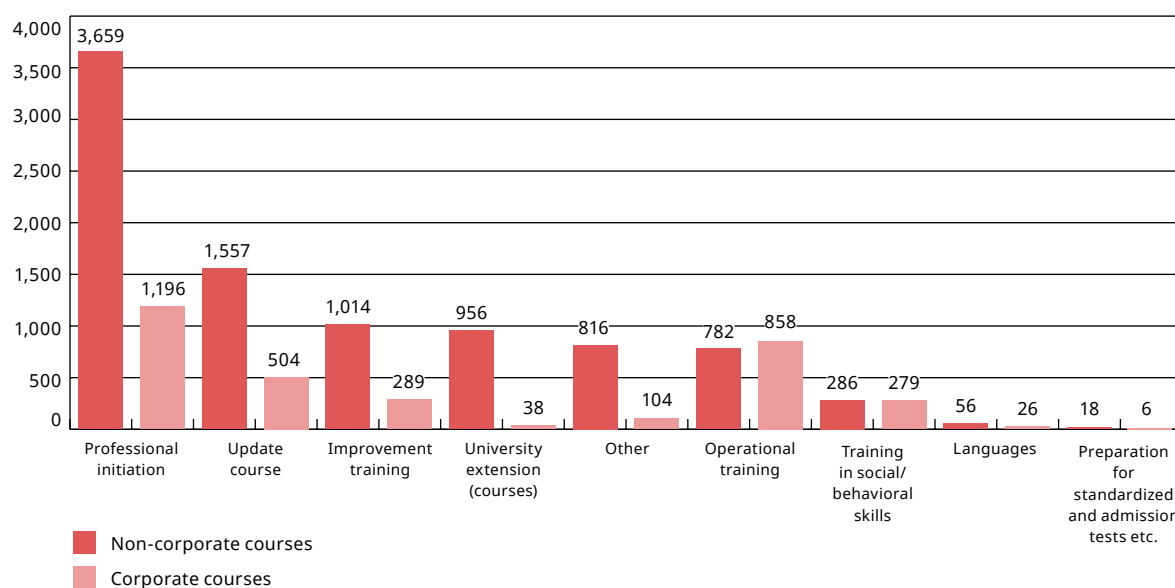
Chart 2.17 – Offer of blended courses, by academic level (in absolute numbers)

In terms of course offer by knowledge area, the preferred type of course were accredited full distance learning courses in Applied Social Sciences – 608 offers registered. Among blended courses, the preferred knowledge area were Humanities, with 1,389 course offers registered.

Regardless of these preferences, the offer was significant in terms of the number of knowledge areas approached, revealing the huge potential of distance learning for a large variety of fields. The course offers by knowledge area registered in the Brazilian Census for Distance Learning are presented on Table 2.11 of Annex 2.

2.7 Offer of corporate and non-corporate open courses

Among corporate and non-corporate open courses, the largest offer was that of professional initiation. The 2015 Brazilian Census for Distance Learning indicates a notably larger number of non-corporate over corporate open courses – 3,659 courses against 1,196 in these modalities:

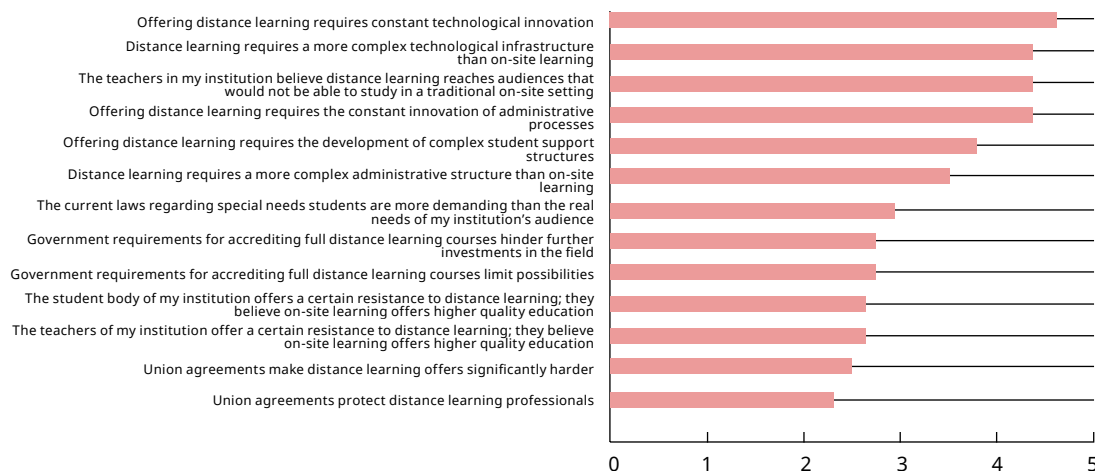
Chart 2.18 – Offer of corporate and non-corporate open courses (in absolute numbers)

2.8 Challenges acknowledged by educational institutions

Educational institutions have said that distance learning requires special attention. In a 1-5 Likert scale, where an average higher than 2.5 means the institution agrees with the statement, and an average of 5 means they strongly agree, we noted that technology was among the most important concerns of respondents, given that distance learning requires large investments in this field, in terms of both innovation and infrastructure. Other important factors to be noted are:

- Distance learning must overcome a series of challenges to cater to students who would not normally have access to on-site learning, which emphasizes the social relevance of this modality.
- Distance learning requires innovation in administrative processes, student support, and more complex management than on-site learning.
- The current laws on distance learning accreditation tend to be seen as an obstacle for investments and pedagogical innovation.
- Most teachers still believe on-site learning offers higher quality than distance learning.
- As for union agreements, they do not seem to value the operation nor protect professionals, according to educational institutions.

Chart 2.19 – Opinion of educational institutions regarding distance learning (in a 1-5 Likert scale)



Other challenges cited were:

- offer of professional training in distance learning;
- creation of a distance learning teaching career plan in the federal system;
- regulations for the tutor role;
- production of materials and methods tailored to the modality;
- better connectivity;
- the non-cannibalization of tuition prices, as it makes the distance learning market difficult for small and medium institutions to access;

- increase in the number of companies offering services for distance learning;
- lengthy accreditation of technical courses;
- room for *stricto sensu* graduate courses.

As can be seen by the participants' spontaneous responses, fierce competition, teacher career plans and the production of materials tailored to this modality, as well as accreditation and infrastructure issues, are a major concern of institutions offering distance learning.

Profile of students in distance learning institutions

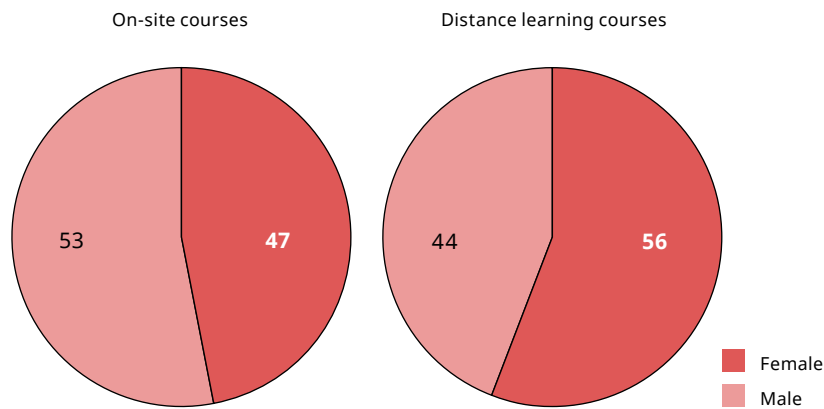


The 2015 Brazilian Census for Distance Learning raised data on the profile of students in distance learning from the point of view of institutions. The questionnaire approached issues of gender, work and study conciliation, age, and courses chosen. The dropout rates and their possible causes were also analyzed.

3.1 Gender

Regarding gender, the data revealed that distance learning has a majorly female audience. Compared to on-site courses, which were composed of 47% women, distance courses have 56% women:

Chart 3.1 – Male and female audiences in on-site and distance learning courses (%)



The trend of larger female audiences was confirmed in all types of courses and most institutional administrative categories. Among the different types, non-corporate open courses attracted a more significant cut of the female audience (60.75%), followed by full distance learning (53.48%) and corporate (52.59%) courses. Blended courses had a female audience of 50.91%, despite their being closer to on-site courses, which even had more men than women.

As for administrative categories, the female audience stood out in non-governmental organizations (NGOs) and the third sector (with 65.83% women), followed by state (61.45%), municipal (60%) and federal (58.27%) public institutions. Non-profit institutions (56.17%) still had more women than for-profit ones (52.31%). Institutions that had more men than women were those of the “S System” and public bodies (in this cases, the Census had counted with 46.84% and 43.25% women, respectively).

Chart 3.2 – Female audience in the different types of distance courses (%)

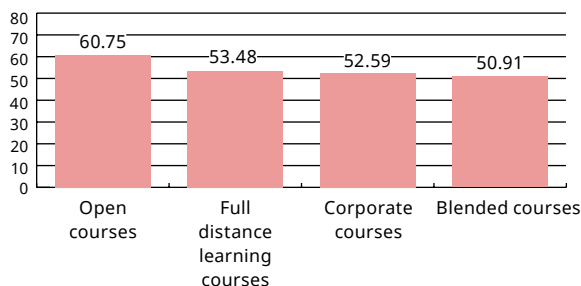
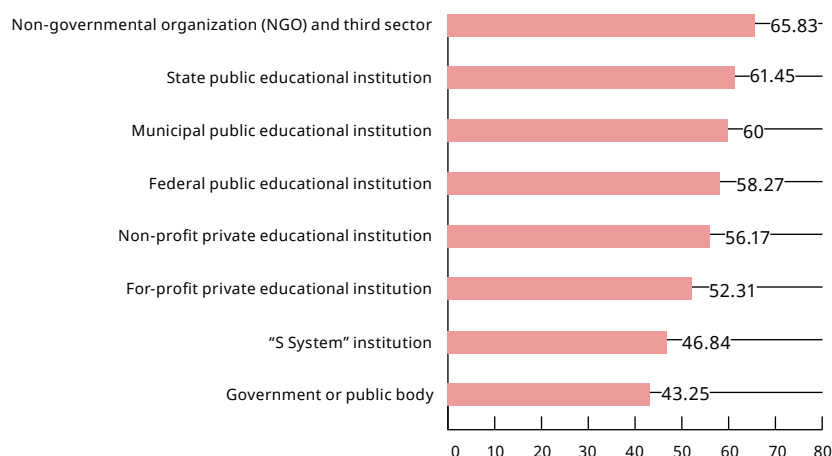
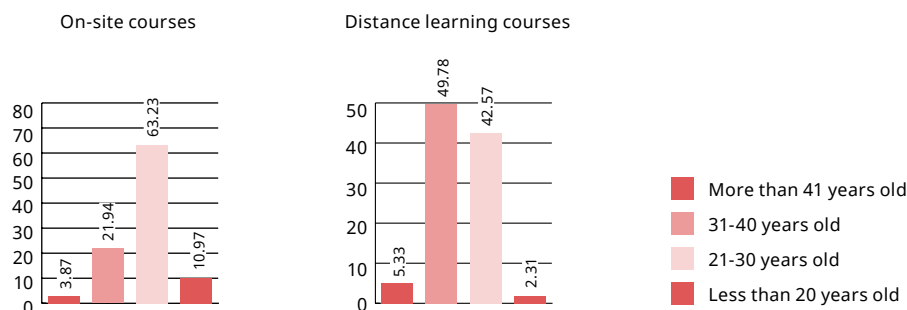


Chart 3.3 – Female audience serviced, by administrative category (%)

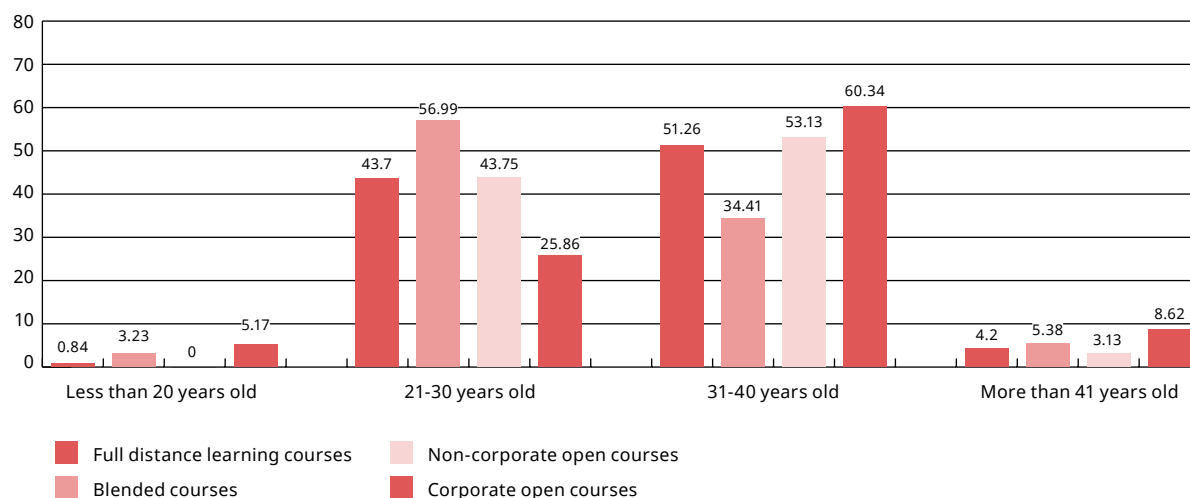
3.2 Age

The average age group informed to the 2015 Brazilian Census for Distance Learning revealed that distance learning students tend to be older than on-site students. When comparing the age pyramid of distance and on-site learning students, it became clear that on-site learning students are concentrated in the age group from 21 to 30 (63.23%), while distance learning students are between 31 and 40 (49.78%).

Chart 3.4 – Age distribution of on-site and distance learning courses (%)

The distribution of the students' age groups among distance learning courses confirms the pattern presented earlier, except for students of blended courses, which have a distribution pattern similar to that of on-site learning – 56.99% of institutions have said the average age of their students is from 21 to 30, while 34.41% is still from 31 to 40.

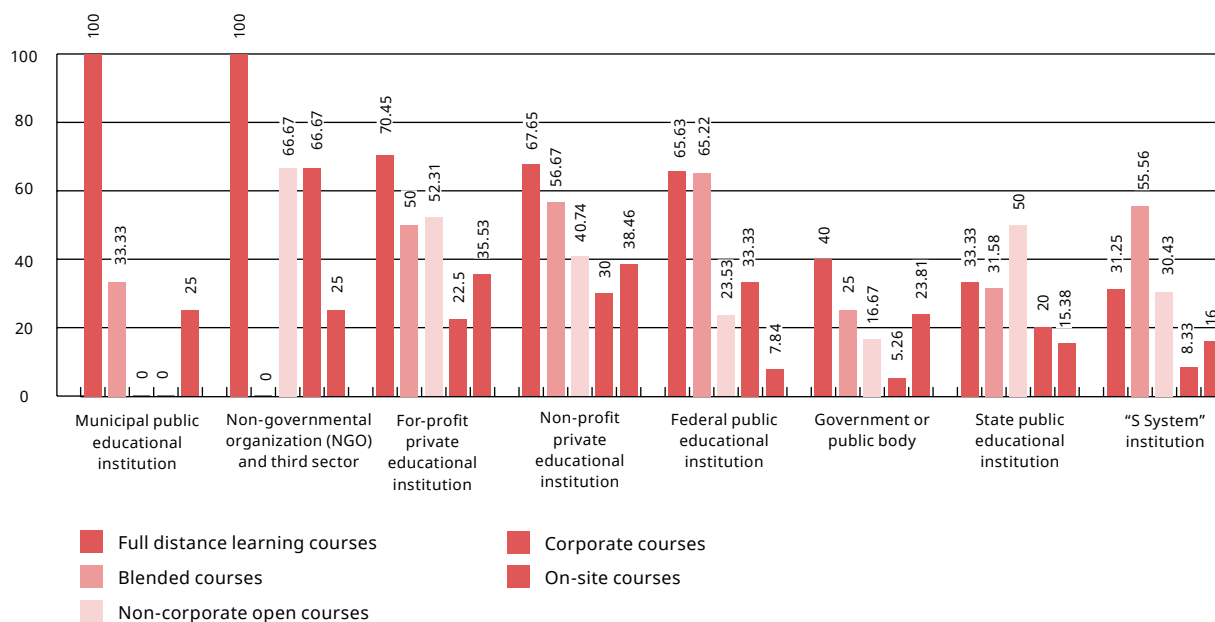
The biggest discrepancy is in corporate courses: 60.34% of institutions informed the average age of their students is 31 to 40, while 8.62% declared that the average age is more than 41, and only 25.86% said their students are 21 to 30 years old:

Chart 3.5 – Age distribution of distance learning students, by type of course (%)

3.3 Work and study balance

As expected, accredited full distance learning courses attracted the most students who study and work (100% of students from municipal public institutions and NGOs and third sector are in this category). For-profit private institutions declared that most of their students (70.45%) study and work; on the other hand, non-profit private institutions indicated a 67.65% rate; while federal public institutions included 65.63% of their student body in this category.

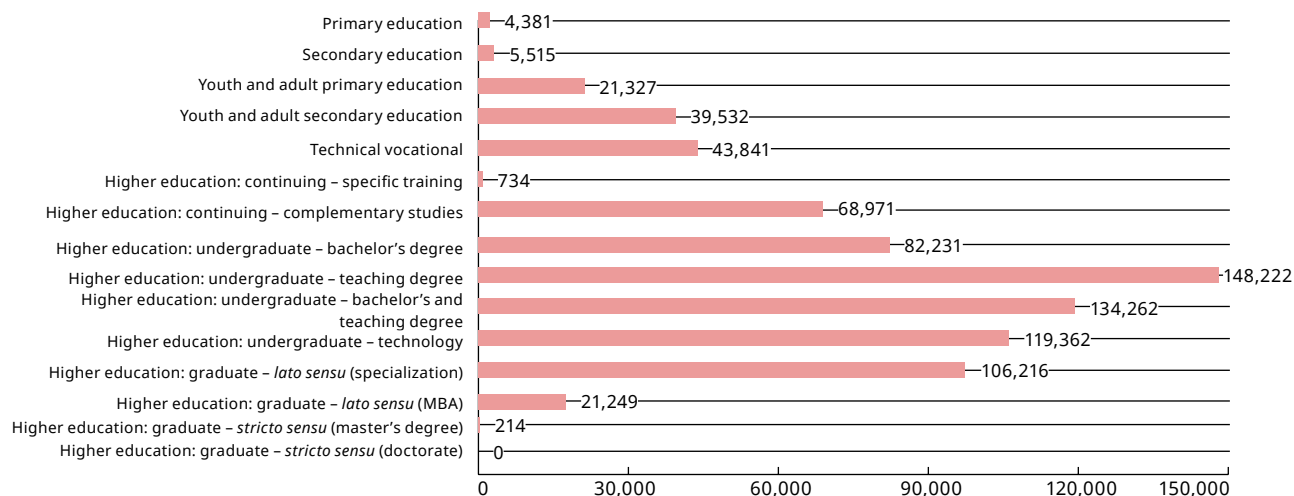
The blended courses of 65.22% of federal public institutions, 55.56% of “S-System” institutions, 56.67% of non-profit private institutions and 50% of for-profit private institutions also had a majority of students that study and work:

Chart 3.6 – Student work and study balance, by type of course (%)

3.4 Enrollments by academic level

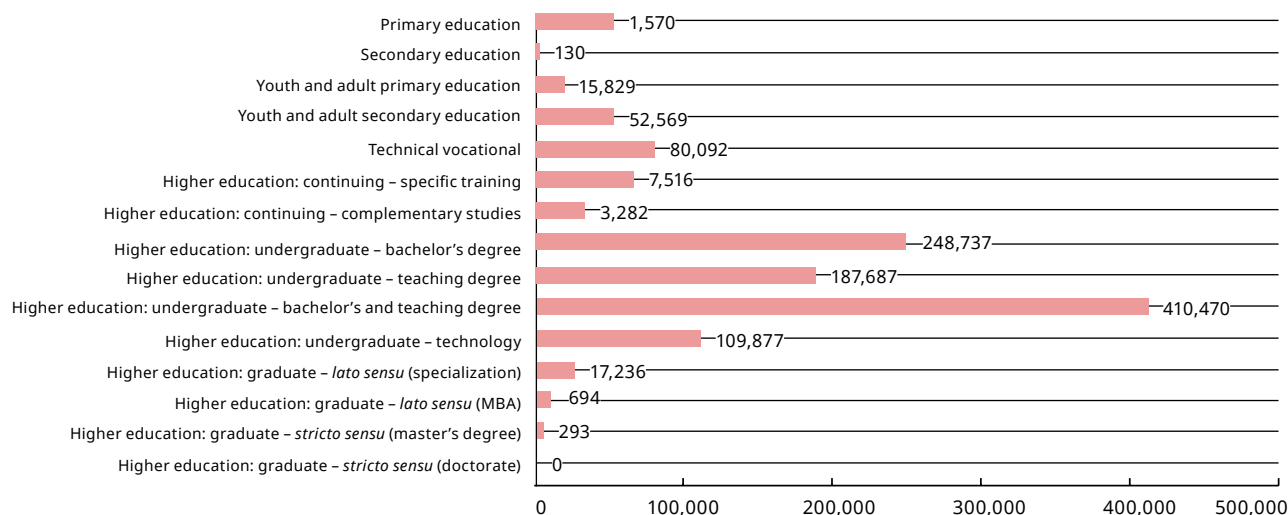
Regarding enrollments by academic level, while specializations had a larger offer of accredited full distance learning courses, teaching degree courses had the most students. We have registered 148,222 enrollments in teaching degree courses and 134,262 in double qualification (which grants both a teaching and bachelor's degree in the same course):

Chart 3.7 – Enrollments in accredited full distance learning courses by academic level (in absolute numbers)



In blended courses, the majority also remained with double qualification, with 410,470 enrollments:

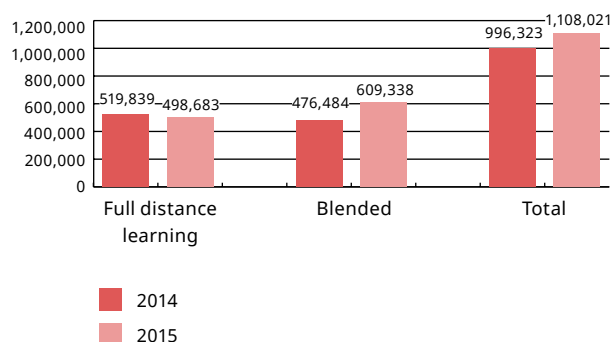
Chart 3.8 – Enrollments in blended courses by academic level (in absolute numbers)



In terms of knowledge area, most enrollments were in the Humanities and Applied Social Sciences, following the trend of course offers.

In the student body profile registered by the 2015 Brazilian Census for Distance Learning, there were 1,108,021 students in accredited full distance learning and blended courses – a significant increase in relation to the past year, which accounted for 996,323 students in accredited courses:

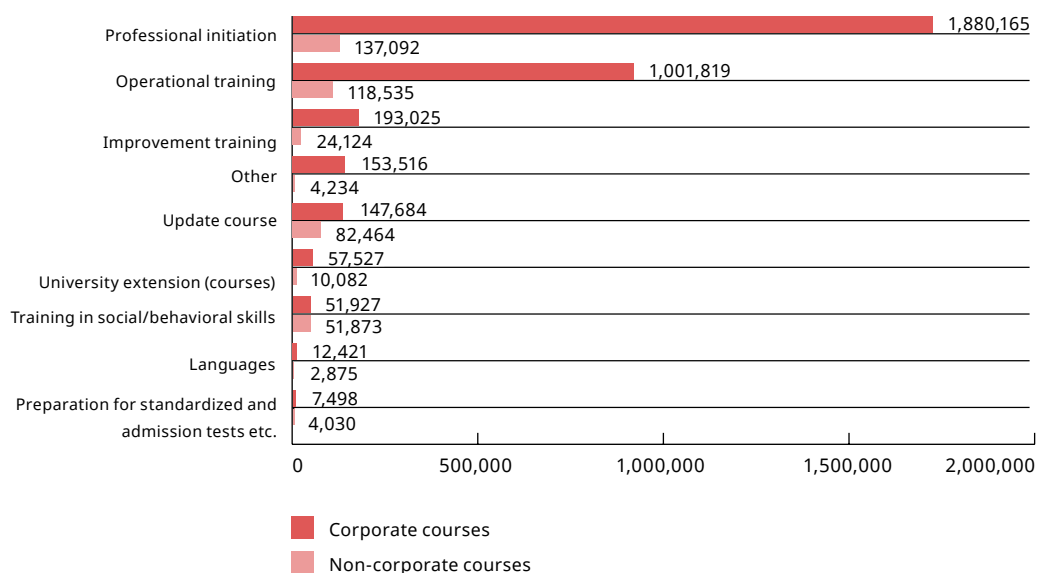
Chart 3.9 – Students in accredited full distance learning or blended courses, according to the Brazilian Census for Distance Learning (2014 and 2015 – in absolute numbers)



3.4.1 Enrollments in corporate and non-corporate open courses

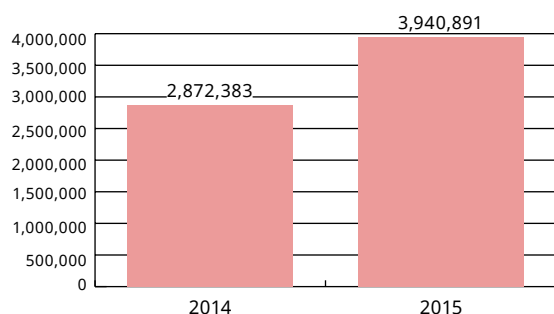
The corporate and non-corporate open courses received the most enrollments, according to the institutions participating in the 2015 Brazilian Census for Distance Learning. Highlights are professional initiation and operational training, with 1,880,165 and 1,001,819 enrollments, respectively:

Chart 3.10 – Enrollments in corporate and non-corporate open courses (in absolute numbers)



The total students in open courses, as per the responses of this Census, is 3,940,891, which is above the 2014 data, with 2,872,383:

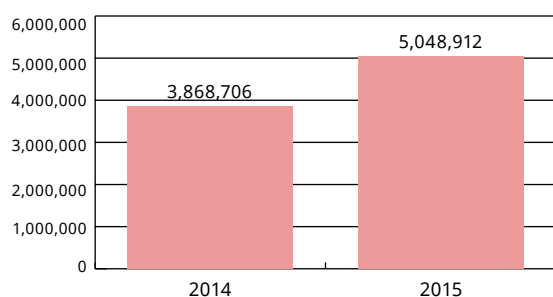
Chart 3.11 – Enrollments in open courses, according to the Brazilian Census for Distance Learning (2014 and 2015 – in absolute numbers)



This enrollment count showed that distance learning involves, at least, **5,048,912 students** in different knowledge areas, academic levels and types of courses.

In 2014, this same Census counted 3,868,706 students, of which 519,839 were in accredited full distance learning courses, 476,484 were in accredited blended courses, and 2,872,383 were in corporate and non-corporate open courses.

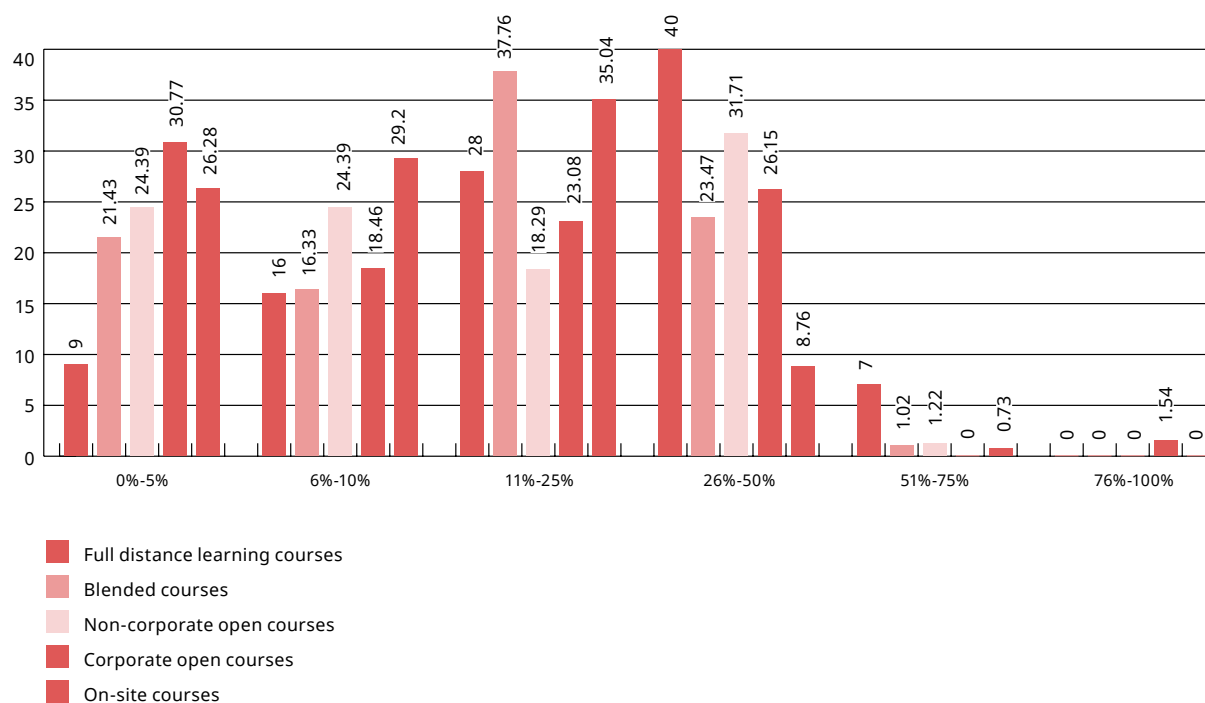
Chart 3.12 – Total students counted in the Brazilian Census for Distance Learning (2014 and 2015 – in absolute numbers)



3.5 The issue of dropouts

Student dropout is a matter that concerns all those involved with distance learning. Understanding its reasons is one of the most important challenges to overcome in distance learning courses:

- In quantitative terms, the 2015 Brazilian Census for Distance Learning has shown that 40% of institutions that offer accredited full distance learning courses had a 26%-50% dropout rate; 28% of establishments had a dropout rate from 11%-25%; 16% from 6%-10%; and 9% from 0%-5%. 7% of institutions even offer courses in this category with dropout rates in the 51%-75% range. No other type of course presented more than 2% of institutions with this level of dropouts.
- Blended courses have shown a more irregular behavior, with 37.76% of institutions that offer blended courses registering dropout rates of 11%-25%.
- Most institutions that offered open courses and establishments that gave corporate courses had low dropouts – 0%-5% (24.39% of institutions that offer non-corporate open courses and 30.77% of those that had corporate courses). Meanwhile, 31.71% of institutions that offered non-corporate open courses presented dropout rates in the range of 26%-50%, a situation shared by 26.15% of establishments that offered corporate courses.
- Some institutions gave on-site courses (35.04%) and suffered dropout rates of 11%-25%. On the other hand, this category of course had the lowest dropout rate in the range of 26%-50% (8.76% of institutions). Moreover, 29.2% of institutions declared a dropout rate in the range of 6%-10% and 26.28% that had rates from 0%-5%.

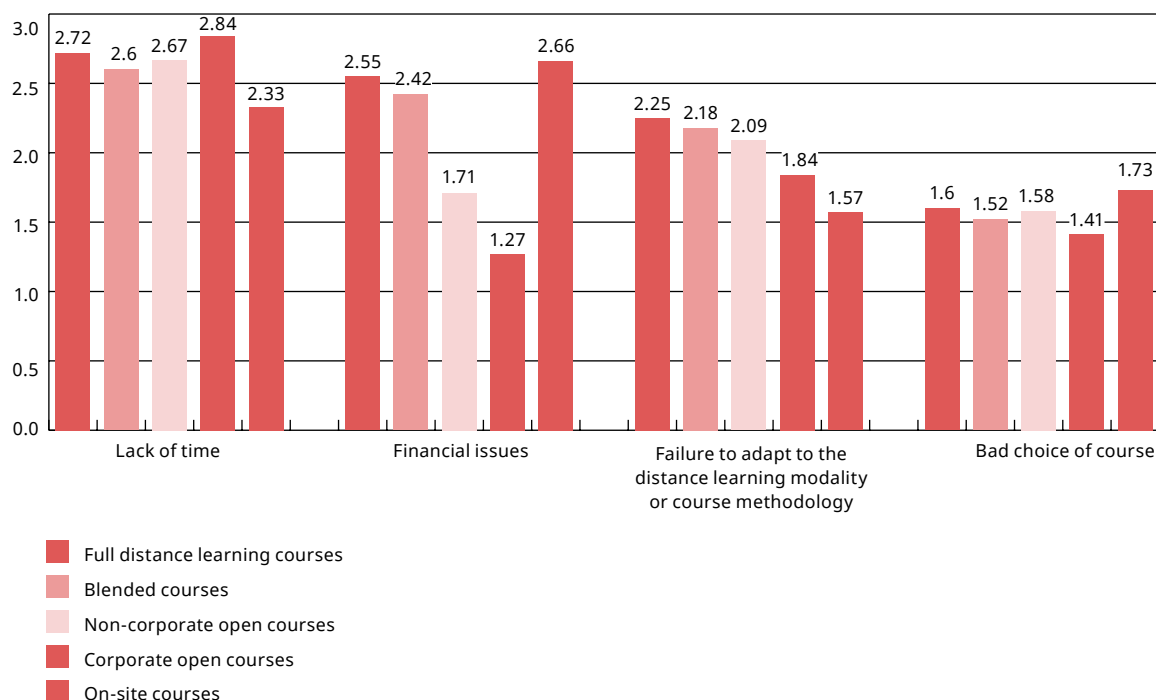
Chart 3.13 – Dropout rates declared by institutions, by type of course (%)

This challenge seems harder, indeed, for accredited full distance learning courses. This fact would deserve a more thorough investigation, so that institutions could keep their students and their income until the end of the courses, and so that students could enjoy the most out of them.

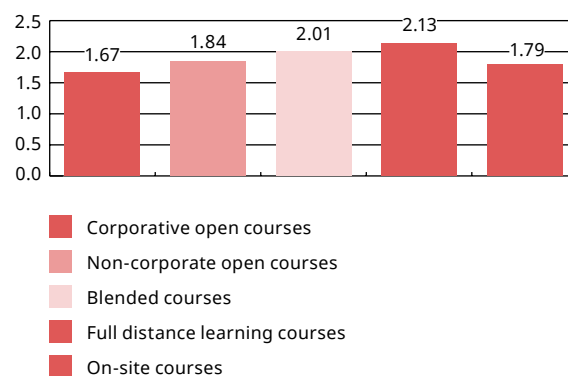
In a 1-4 Likert scale, where any value above 2 indicates the respondent agrees with the statement, and 4 indicates they strongly agree, the 2015 Brazilian Census for Distance Learning presents the following scenario:

- The major factor responsible for dropouts in accredited full distance learning courses appears to be lack of time, with an average agreement of 2.72, followed by financial issues (2.55) and failure to adapt to the modality (2.25). The impression of having chosen the wrong course was also a factor pointed out by some institutions, but to a lesser degree.

- Blended courses maintained the same pattern of dropout reasons, to a lesser degree. The average agreement index is concentrated in lack of time (2.6), financial issues (2.42) and failure to adapt to the modality (2.18).
- The non-corporate open courses pointed out lack of time and failure to adapt to the modality as very relevant, with agreement levels of 2.67 and 2.09, respectively. Financial issues did not receive significant emphasis, with average agreement of 1.71.
- This pattern was repeated among corporate courses – financial issues are of even lesser concern, with an average 1.27 agreement, and the element most mentioned regarding dropouts is lack of time, with 2.84 agreement, the highest record.

Chart 3.14 – Dropout reasons, by type of course (in 1-4 Likert scale)

The dropout rates of accredited full distance learning courses were certainly the highest. On the other hand, this modality was also considered the most accessible for students to return. The option “Not applicable (the student can come back at any time)” of the questionnaire of this Census had the highest average agreement index (2.13), showing that dropouts in accredited full distance learning courses can be temporary and related to the students’ lack of time and financial issues in these courses:

Chart 3.15 – Index of agreement with the statement “Not applicable (the student can come back at any time)” (in 1-4 Likert scale)

Parte 4

Distance learning professionals



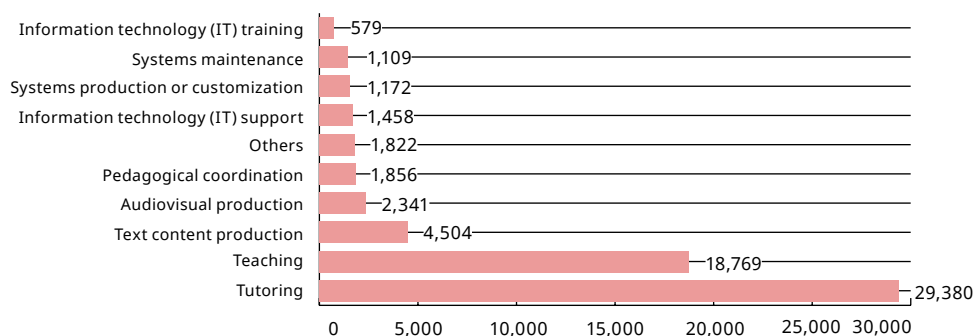
This section presents the profile of distance learning professionals as they are hired by educational institutions, or by content and technology suppliers.

4.1 Professionals in distance learning educational institutions

Among distance learning professionals, tutors and teachers stand out for their number. On the other hand, distance learning courses also create jobs for content producers, pedagogical coordinators, information technology (IT) technicians, programmers and professionals specialized in systems customization, professionals specialized in training, among many other roles, which may not be listed, but are considered invaluable for institutions and their distance learning-related processes. Among them, the following roles are mentioned as distance learning professionals:

- Network administration;
- Administration/finance;
- Administration/office;
- Educational analyst;
- Academic support;
- Educational technical consulting;
- Student support;
- Student registration on the platform;
- Student support center;
- Sales;
- Distance learning department coordination;
- Hub coordinators and on-site tutors;
- Instructional designer;
- Platform developer;
- Visual designer;
- TV editor;
- Multidisciplinary team;
- Continuing education;
- Journalist;
- Marketing;
- Supervisors;
- Educational counselor;
- Video producers;
- Technical standards reviewer;
- Proofreader;
- Satellite broadcast support technician.

Chart 4.1 – Professionals involved with distance learning, by role (in absolute numbers)



4.1.1 Wages of distance learning professionals

Among the amounts paid to distance learning professionals, most tutors (68%) earned from R\$ 31 to R\$ 45 an hour, as well as teachers and content producers, to a lesser extent (52% in both cases). Among coordinators, 41% earned from R\$ 31 to R\$ 45 an hour, and 21% earned R\$ 46 - R\$ 55. All categories declared they had professionals earning up to R\$ 75 an hour:

Chart 4.2 – Hourly wages paid to tutors (2015) (%)

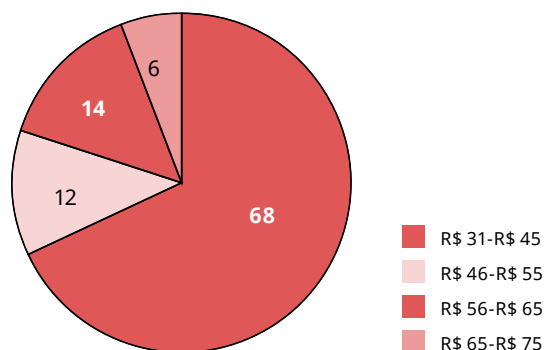


Chart 4.3 – Hourly wages paid to teachers (2015) (%)

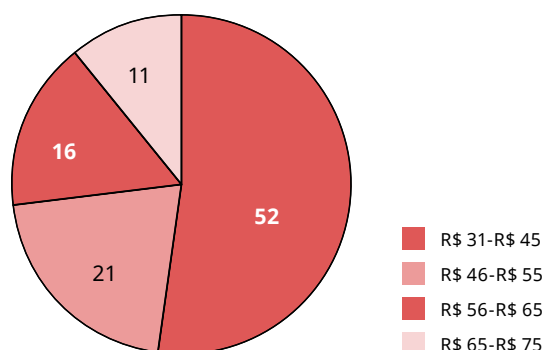


Chart 4.4 – Hourly wages paid to coordinators (2015) (%)

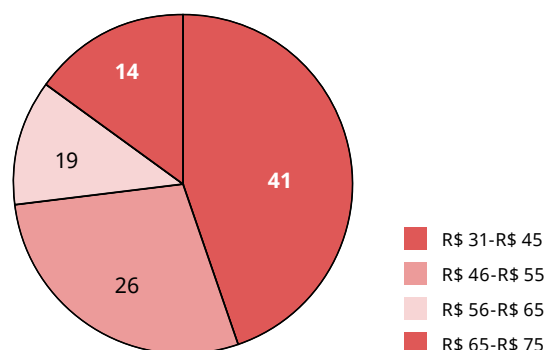
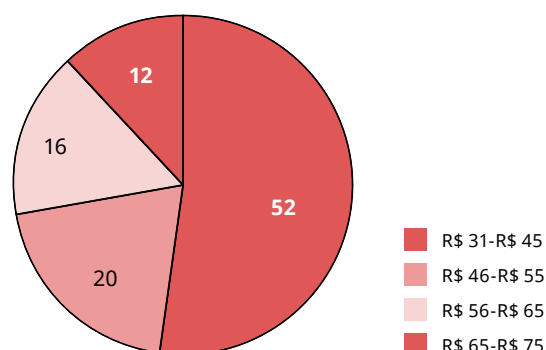


Chart 4.5 – Hourly wages paid to content producers (2015) (%)



4.2 Production teams for distance learning content and tools

In this section, we trace a profile of the professionals in charge of creating distance learning content in the following media: text, audiovisual and technological resources. The classification criteria for the actors involved focused on type of production:

- institutions that produce autonomously;
- outsource production steps;
- outsource production (under supervision of the institution) or buy from third parties;
- use free resources, either customized or not.

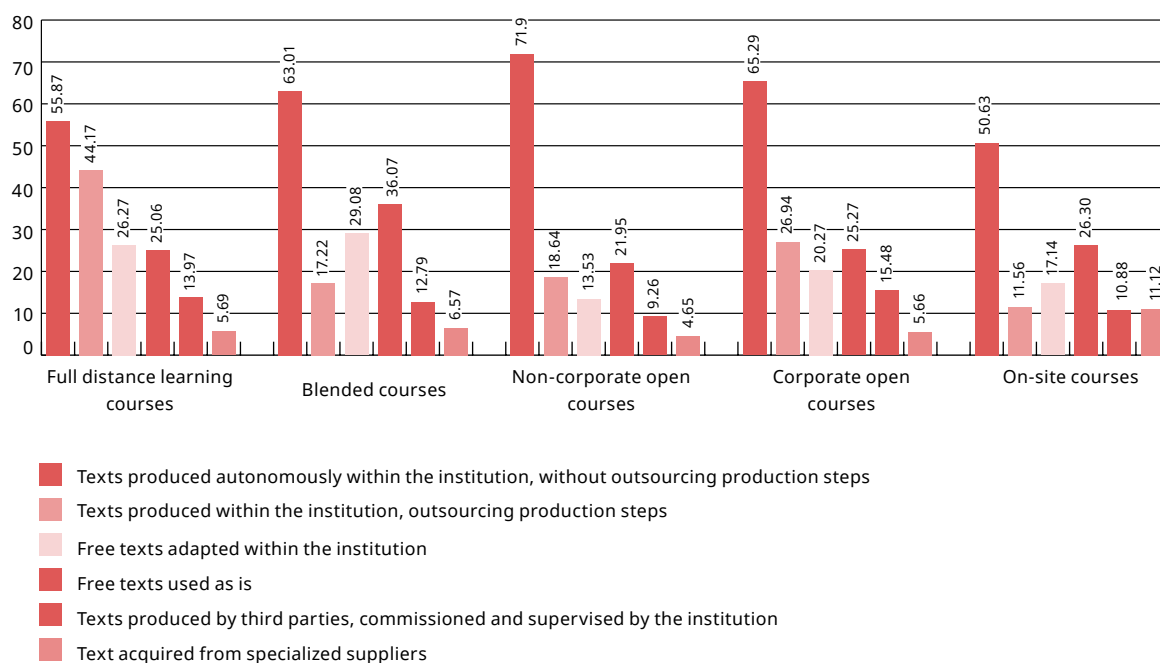
4.2.1 Text content production

The institutions showed a tendency to produce their own text content autonomously. For all types of courses, more than 50% of institutions produced their own materials. The 44% of institutions offering accredited full distance learning courses outsourced a given step of the production.

A parcel of 21% to 29% of institutions used free content, customized or not, and only 5% to 13% commissioned third-party texts or bought finished content from suppliers.

It is worth noting that on-site courses use the types of content mentioned to a lesser degree. Yet, in this category, the prevalence was for the use of free content and buying third-party content.

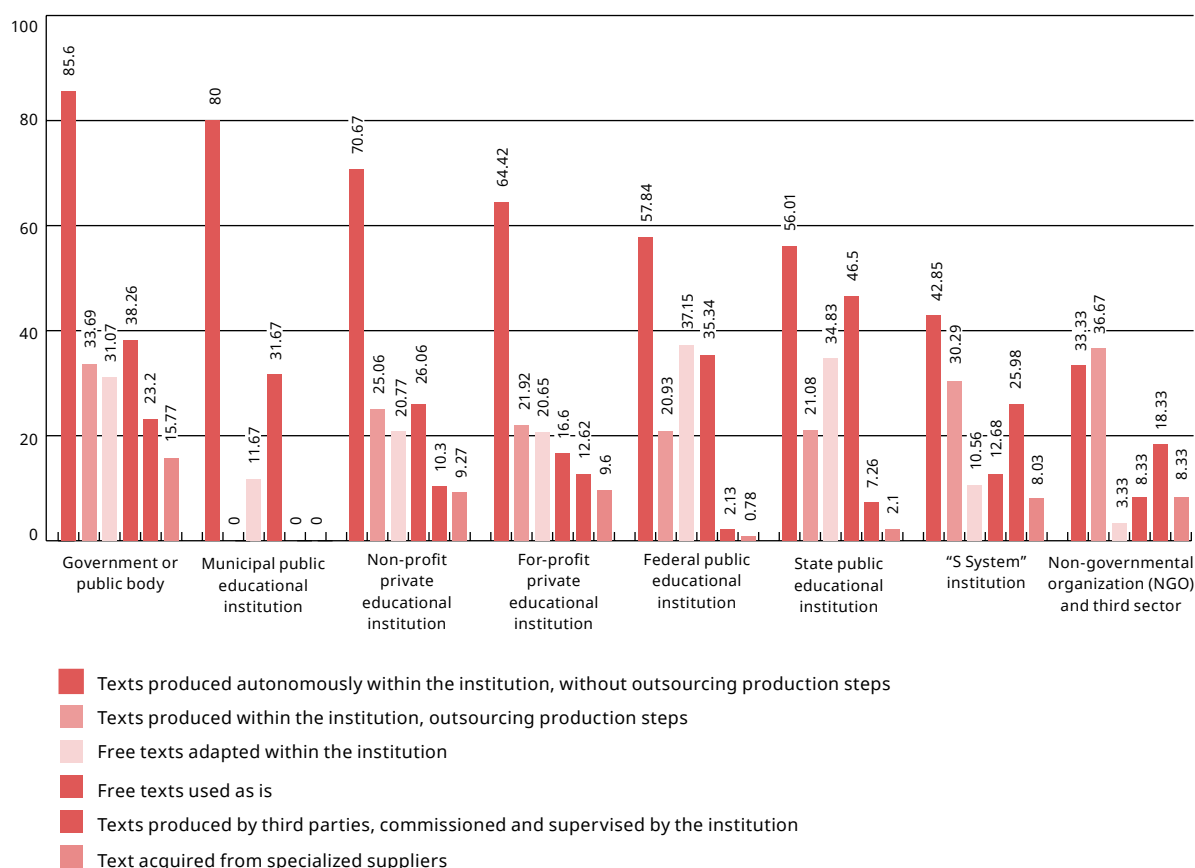
Chart 4.6 – Type of production or acquisition of text content for distance learning used by the institutions, by type of course (%)



If we look at text production by administrative category, we can say that public institutions practically did not buy third-party text material, while public bodies, the third sector, private institutions and “S System” institutions did more often.

All administrative categories, except the “S System” and the third sector, declared that over 50% of their institutions produced their own content:

Chart 4.7 – Type of production or acquisition of text content for distance learning used by the institutions, by administrative category (%)



4.2.2 Audiovisual production

Audiovisual content production also presented a strong emphasis on autonomous material creation. However, outsourcing production steps and commissioning resources are also practiced. As for free content, its use was declared by 10%-24% of institutions.

Adopting free content produced autonomously was emphasized by institutions that offer non-corporate

open courses (59.48%), while the purchase of materials was higher among establishments that offer accredited full distance learning courses – 27.77% of institutions outsourced steps of production and bought commissioned and supervised resources. On-site courses used this type of resource the least, regardless of how the materials were produced:

Chart 4.8 – Type of production or acquisition of audiovisual content for distance learning used by the institutions, by type of course (%)

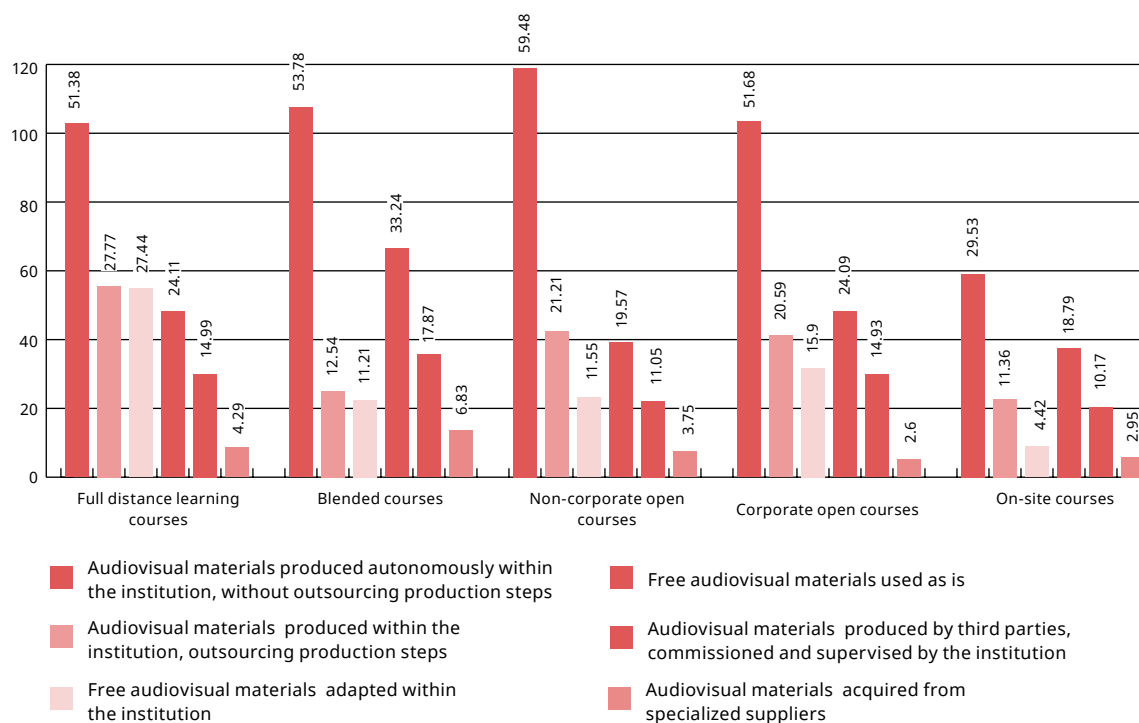
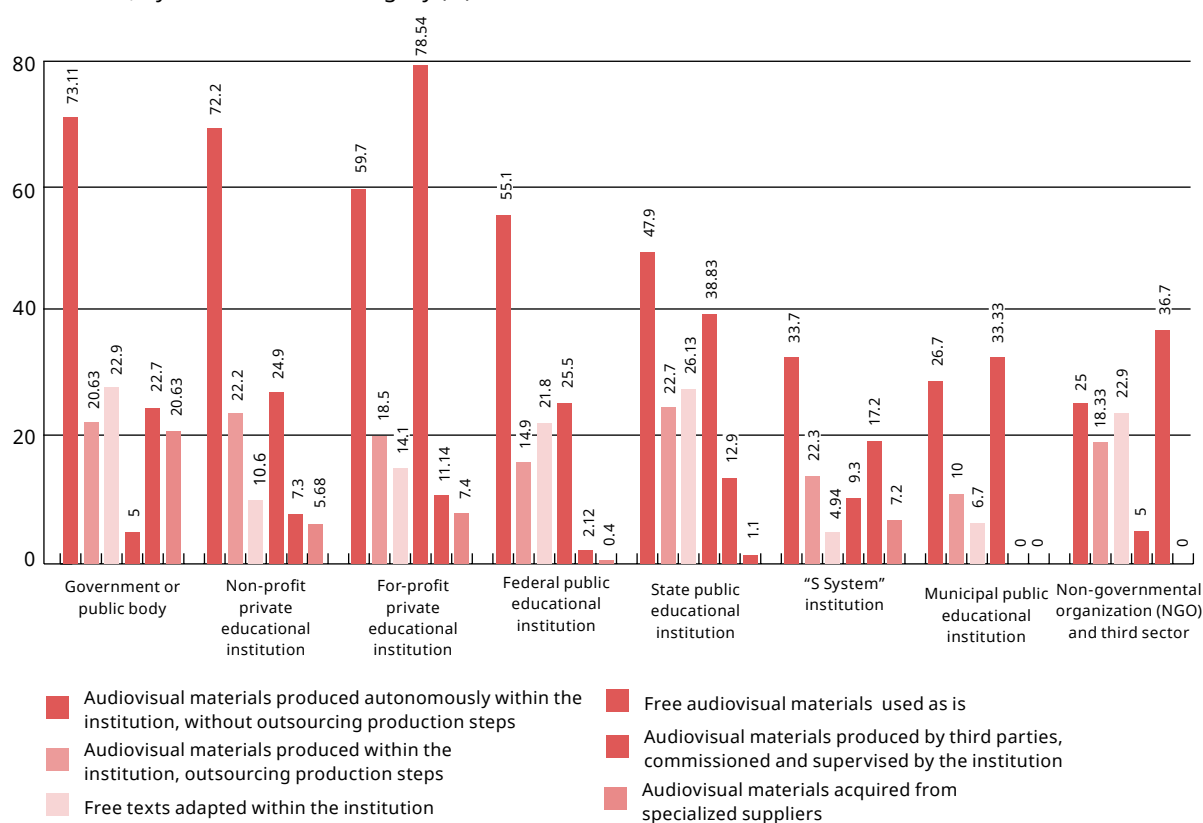


Chart 4.9 – Type of production or acquisition of audiovisual content for distance learning used by the institutions, by administrative category (%)



4.2.3 Production of complex technological resources: animations, simulations, games and adaptive resources

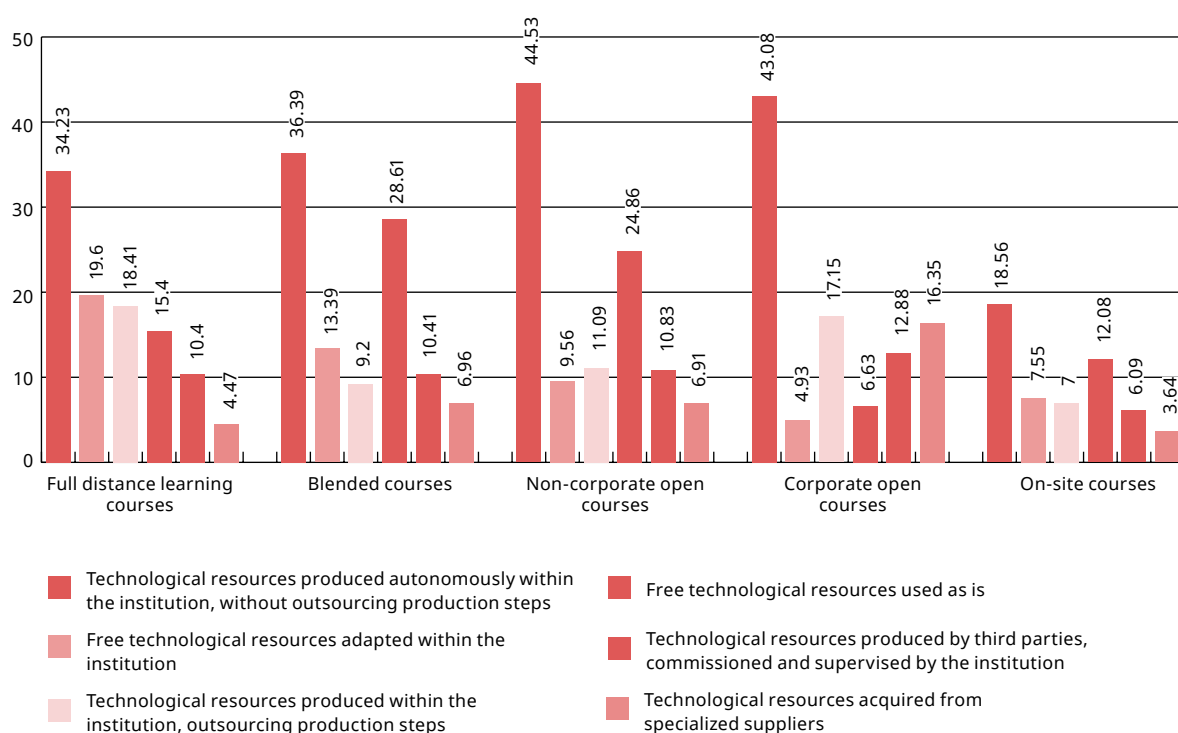
More complex technological resources, involving animations, simulations, games or adaptive resources, were also mostly produced autonomously, despite the proportionally lower number of institutions that declared producing them (18% and 44%).

Among accredited full distance learning courses, there was also a high incidence of non-customized free resources (15.4%).

The type of course that most acquired materials from specialized suppliers were corporate open courses (16.35%).

On-site courses were the ones who produced or acquired these resources the least:

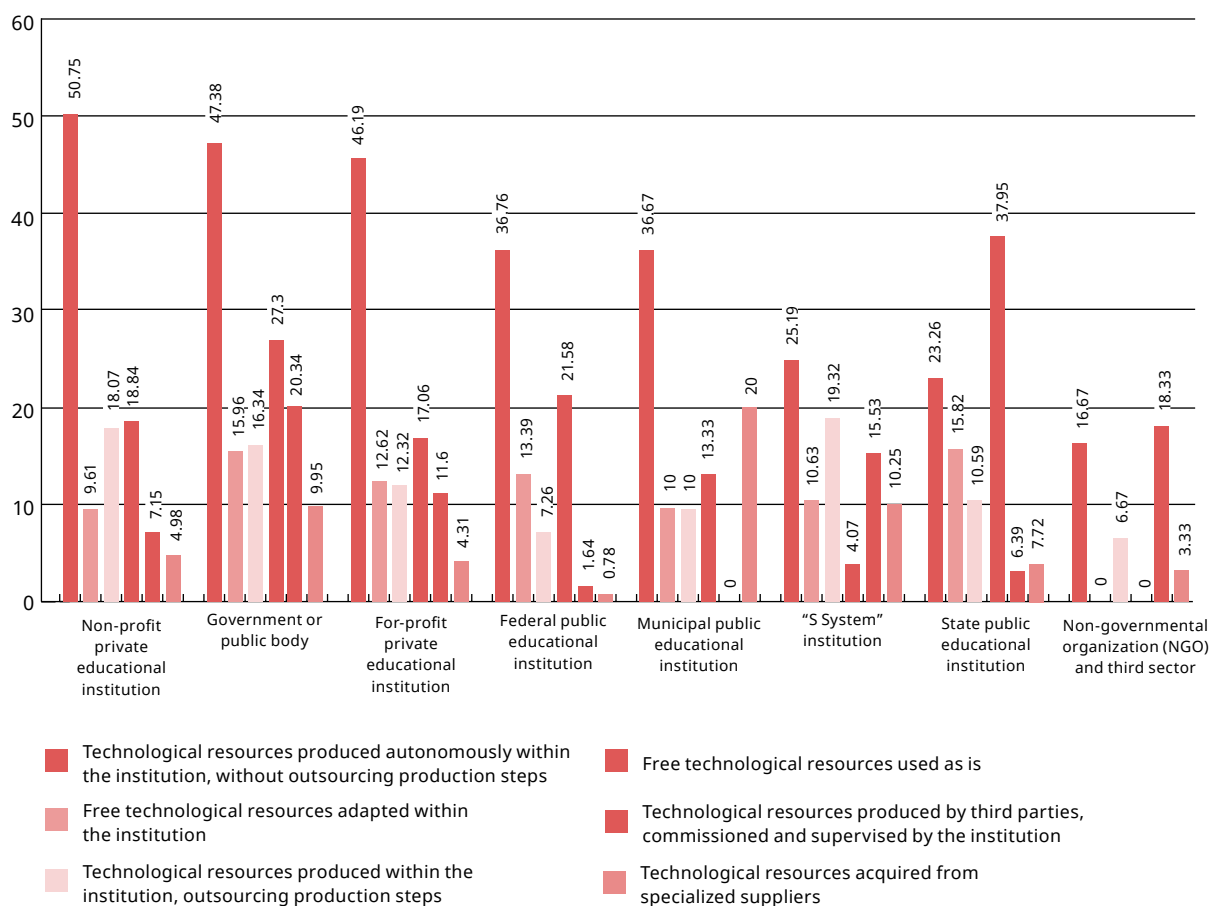
Chart 4.10 – Type of production or acquisition of technological resources for distance learning used by the institutions, by type of course (%)



In terms of institutions, those that produced their own resources the most were non-profit private institutions (50.75%).

Those that acquired finished resources the most were municipal public institutions (20%), and those that acquired commissioned and supervised resources the most were public bodies or government (20.34%).

Chart 4.11 – Type of production or acquisition of technological resources for distance learning used by the institutions, by administrative category (%)



*Management
of educational
institutions and
current state of the
distance learning
market*

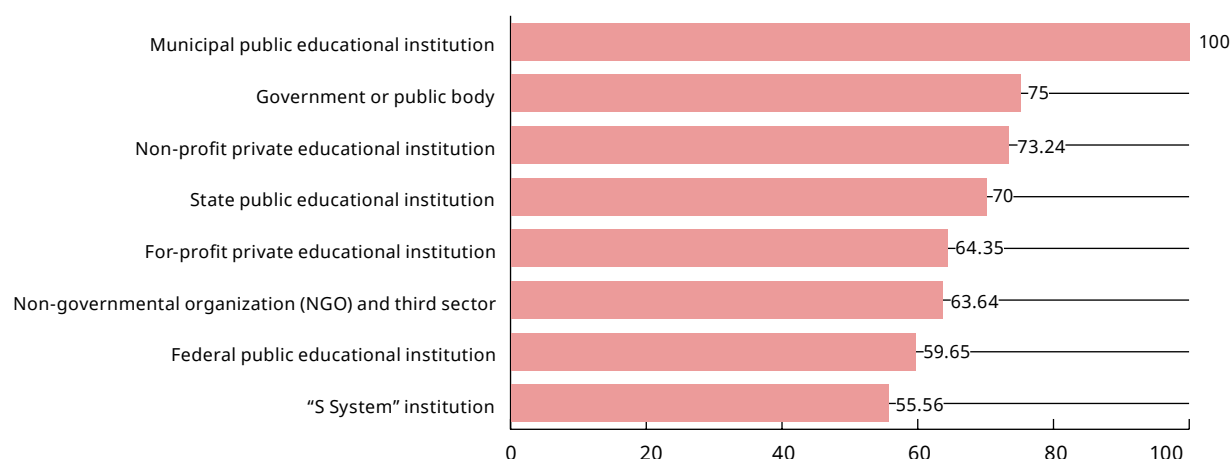


In this section, is present a panorama of the management of educational institutions and the state of their businesses. We cover the type of management, increase or decrease in investments, income and enrollments and investment perspectives for the next year.

5.1 Type of management: centralized or decentralized

Most institutions that participated in the 2015 Brazilian Census for Distance Learning present a centralized management of their distance learning programs:

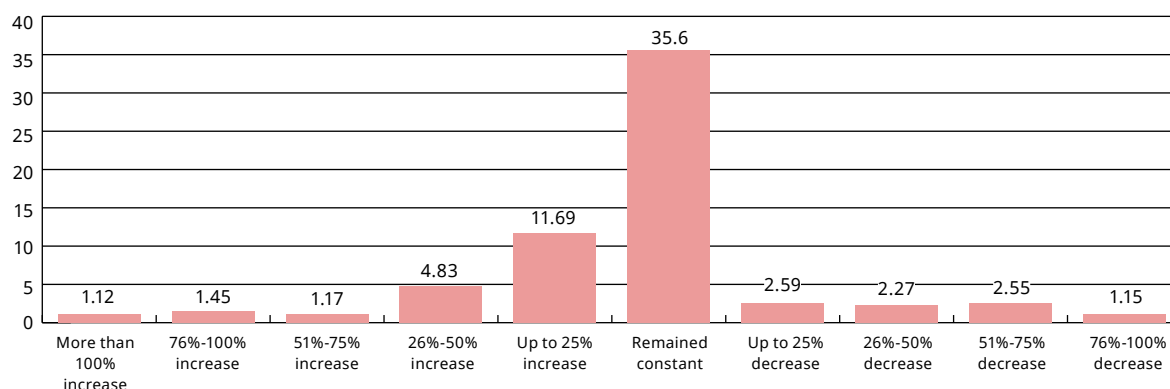
Chart 5.1 – Institutions with centralized management, by administrative category (%)



5.2 Investments

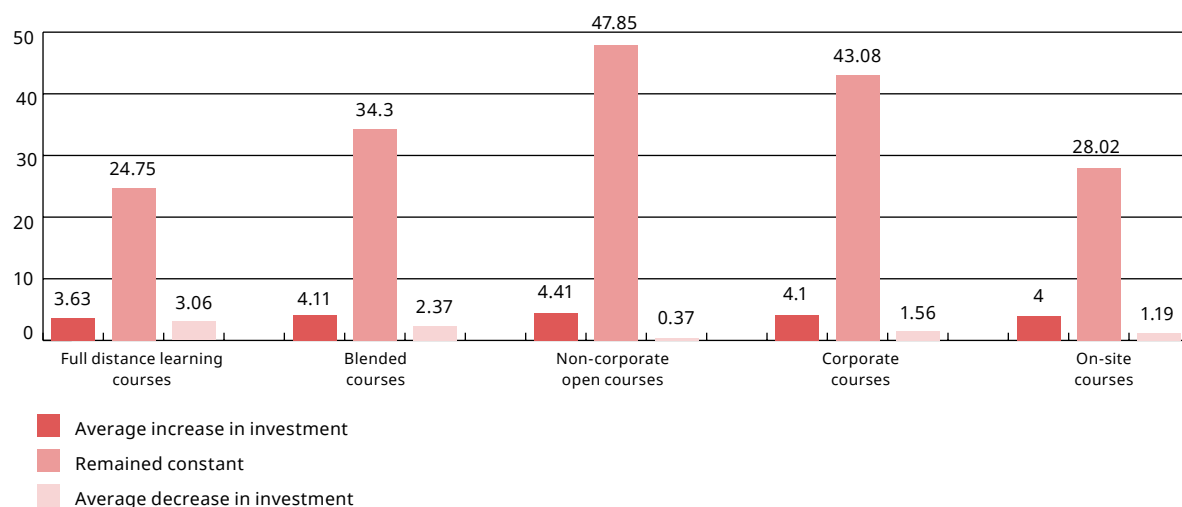
Investments in distance learning tended to remain constant, with a slightly higher percentage of institutions that increased their investments over those that reduced them (20.26% and 8.56%, respectively):

Chart 5.2 – Investment profile of educational institutions (2015) (%)



Among the types of courses, those that received the most investments were non-corporate open courses (4.41%), as shown in the chart below:

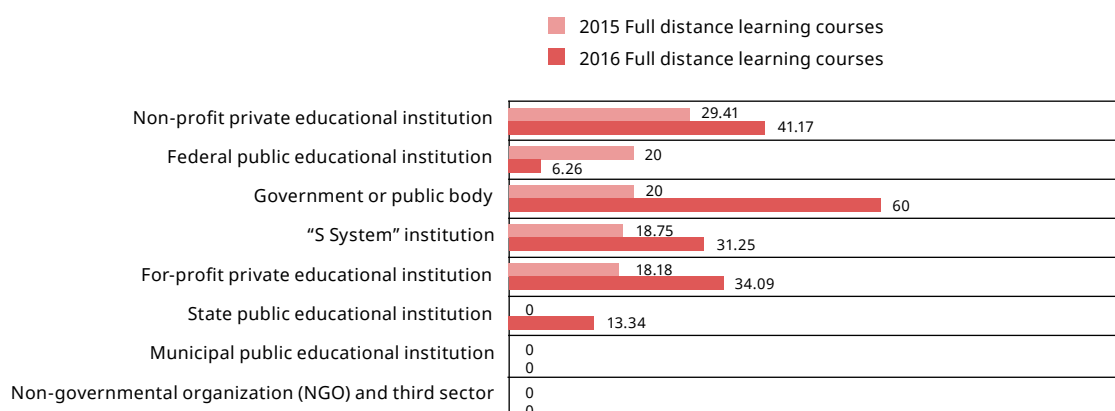
Chart 5.3 – Investment profile of the different types of courses (%)



In comparison among institutions that increased investments in 2015 and those who wish to increase investments in 2016, it is possible to observe a trend to higher future investments.

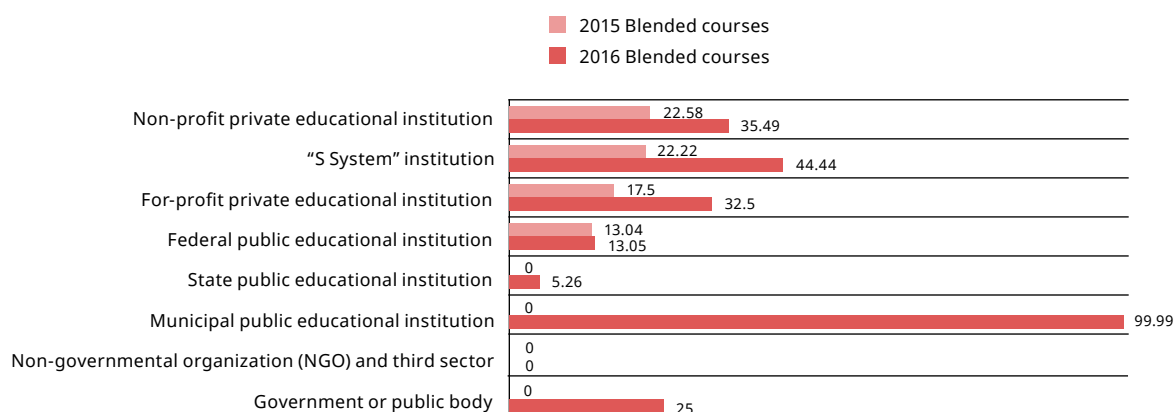
In 2015, non-profit private educational institutions invested more in full distance learning courses (29.41%). In 2016, 41.17% of non-profit private educational institutions intend to invest in this modality. Public bodies, whose increase in investments was more subtle in 2015 (20% of respondents), plan to increase investment in full distance learning courses in 60% of institutions. The “S System” institutions and for-profit private educational institutions also plan significantly increasing investments in full distance learning courses – approximately 18% to over 30% of the institutions:

Chart 5.4 – Comparison of increase of investments made in 2015 and planned for 2016 in full distance learning courses, by institutions of different administrative categories (%)



The blended courses, which received relatively little attention in 2015 (with approximately 17% to 22% of private educational institutions and "S System" institutions increased investment in this mode), more likely will receive contributions in 2016. The institutions of "S System" (44%), non-profit private institutions (35.49%) and for-profit private institutions (32.5%) plan to increase investments in this mode in 2016:

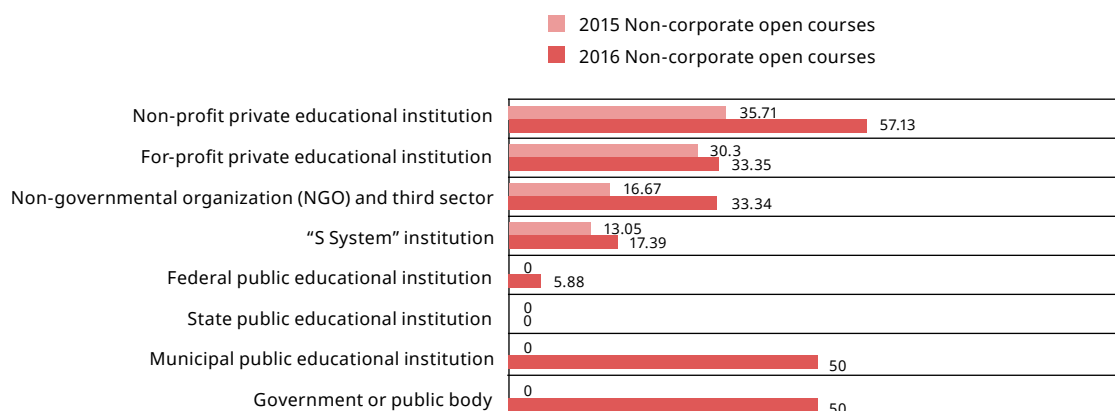
Chart 5.5 – Comparison of increase of investments made in 2015 and planned for 2016 in blended courses, by institutions of different administrative categories (%)



Free courses, which received more investments from non-profit and for-profit private institutions in 2015 (35.71% and 30.3%, respectively), should receive further investments in 2016 - 57.13% of non-profit private institutions and 33.35% of for-profit private institutions.

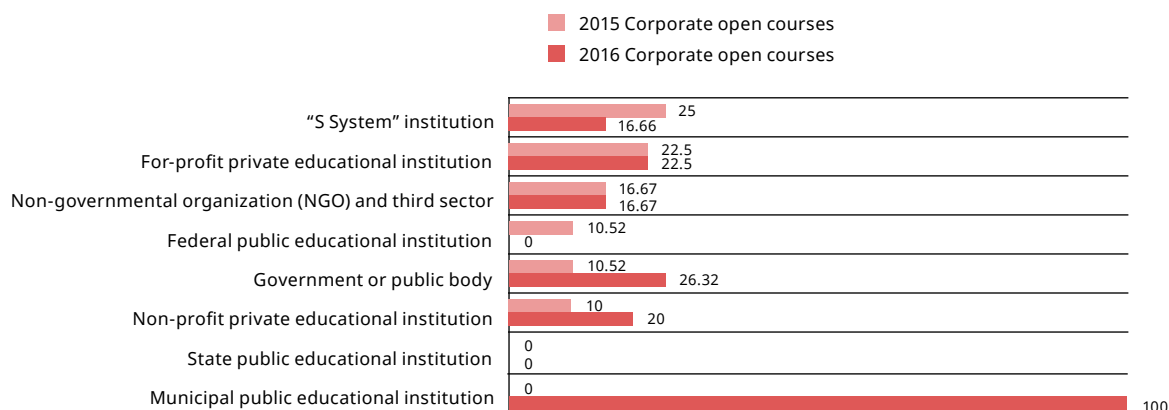
A portion of 50% of federal public educational institutions and public bodies, which did not increase investment in free courses in 2015, to invest more in this modality in 2016:

Chart 5.6 – Comparison of increase of investments made in 2015 and planned for 2016 in open non-corporate distance learning courses, by institutions of different administrative categories (%)



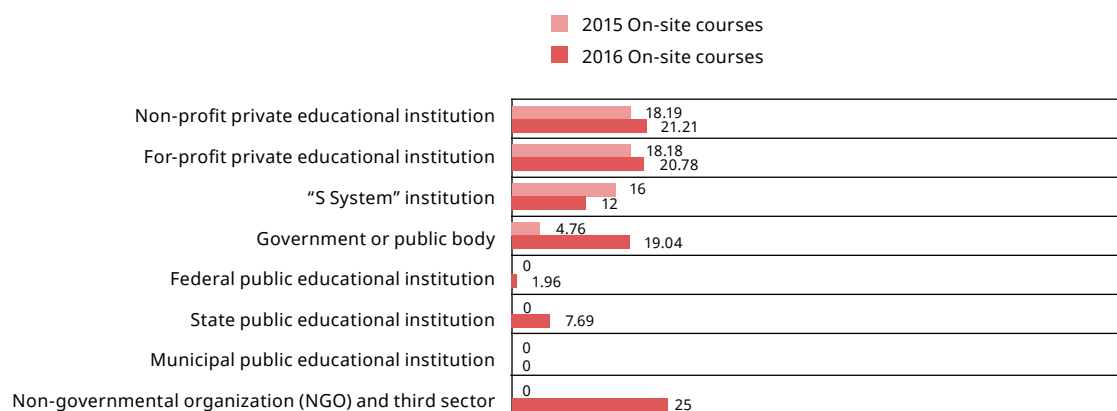
Corporate courses received relatively low investments in the year earlier reference to this Census - between 0% and 25%. The mode does not have expected to receive a significant increase in investment by institutions participating in the 2015 Brazilian Census for Distance Learning, except for public bodies (26.32%) and municipal public educational institutions (100%):

Chart 5.7 – Comparison of increase of investments made in 2015 and planned for 2016 in open corporate distance learning courses, by institutions of different administrative categories (%)



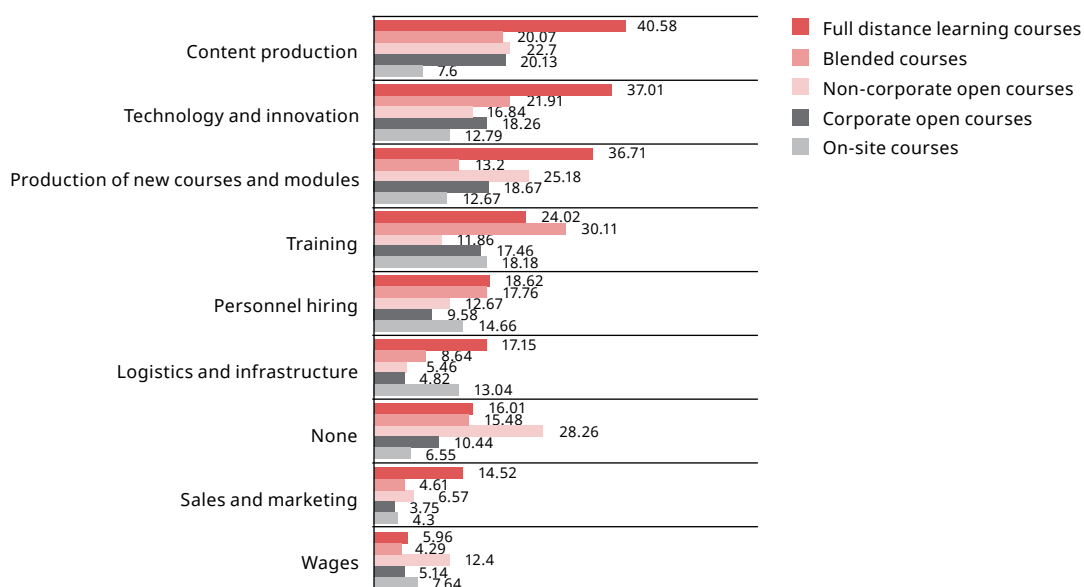
On-site courses, which received the smallest increase in investments in the previous year to this Census (0% -18% of the sample), must present a small recovery in public bodies and NGOs:

Chart 5.8 – Comparison of increase of investments made in 2015 and planned for 2016 in on-site courses, by institutions of different administrative categories (%)

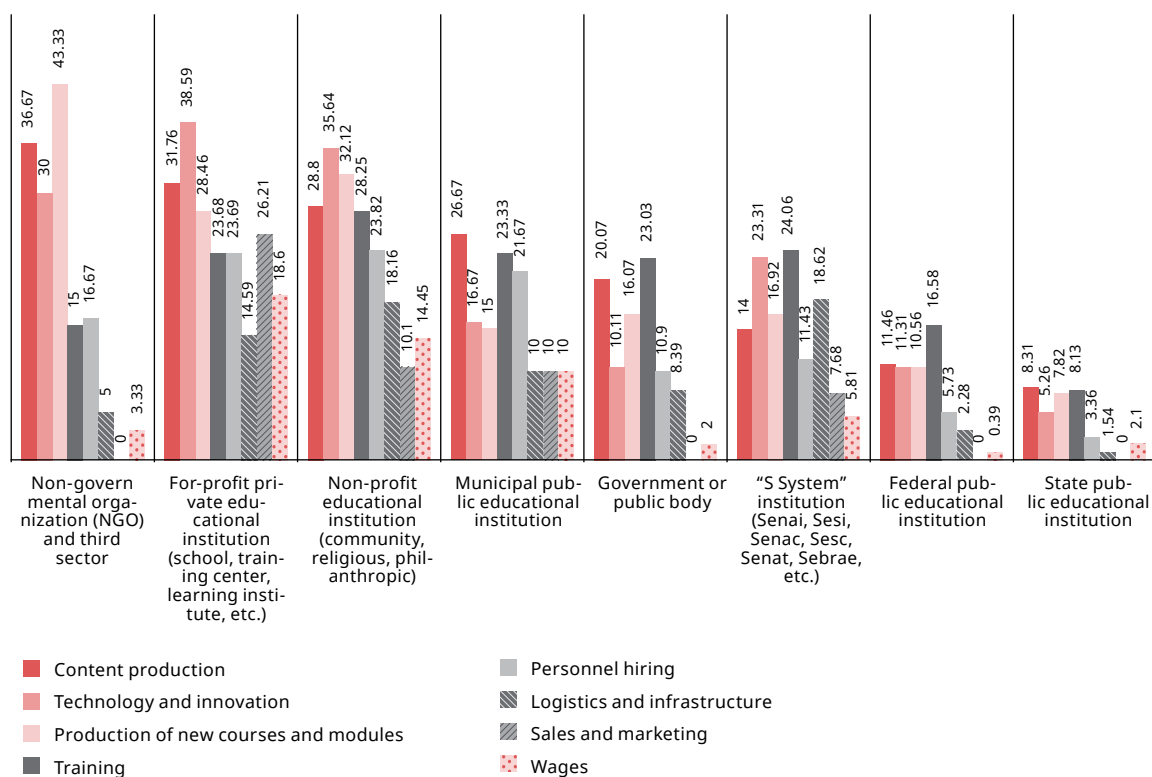


The area of content production received more investments in 2015 (40.58% of institutions that offer full distance learning courses invested in this item). They can also be cited areas of technology and innovation (37.01%), creation of new courses and modules (36.71%) and training (25.02%). It is worth noting that, among blended courses, the largest investment of 30.11% of the institutions was aimed at training:

Chart 5.9 – Areas that received increase in investments, by type of course (%)

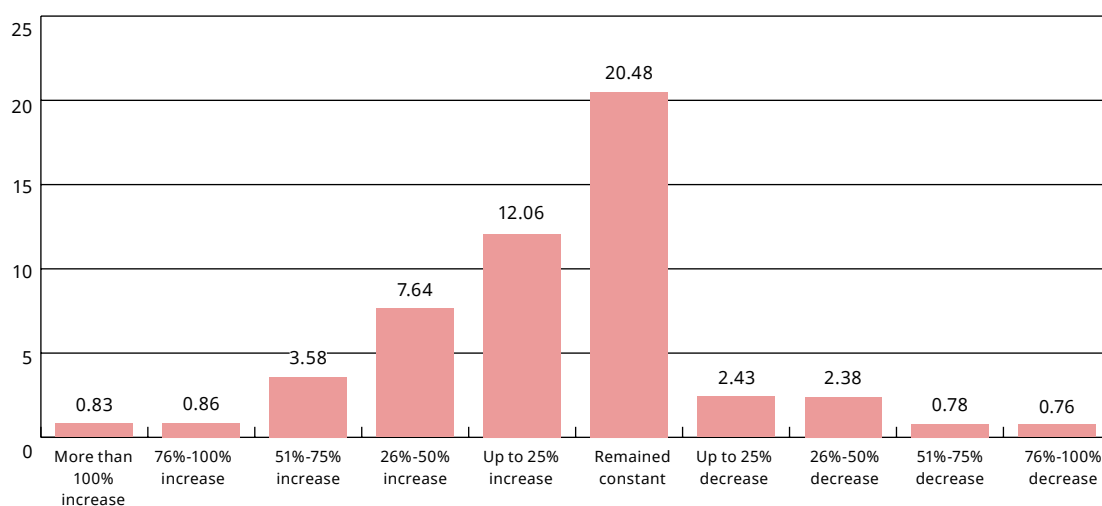


Among the administrative categories – except for the NGOs, which are unrepresentative in the sample –, for-profit and non-private educational institutions invested more in all categories than public institutions:

Chart 5.10 – Areas that received increase in investments, by administrative category (%)

5.2.1 Investment forecast

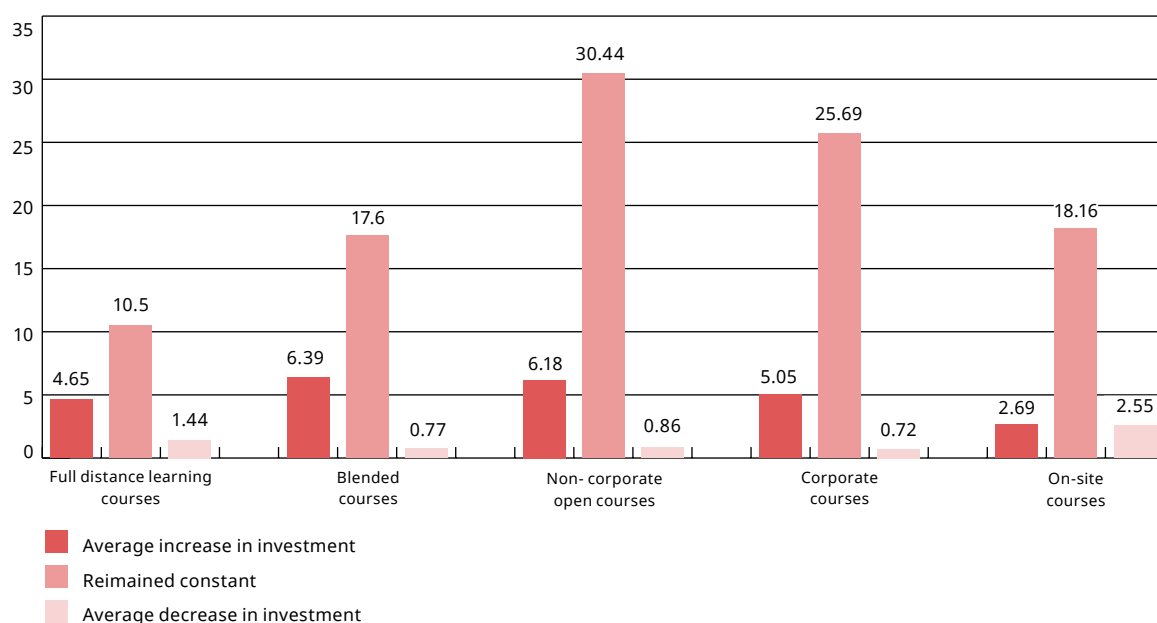
Institutions forecast that investments will see a slight improvement in the future: 24.97% of institutions intend to increase their investments, 20.48% intend to maintain them, and 6.35% intend to reduce them:

Chart 5.11 – Distance learning investment forecast for 2016 (%)

The recipients of these investments tend to be blended courses: 6.39% of institutions intend to increase their investments in this type of course. There is also a tendency to reduce investments in on-site learning (2.55%)

despite a forecast of 2.69% of establishments that intend to increase their investments; less than the 4% that increased their investments in 2015:

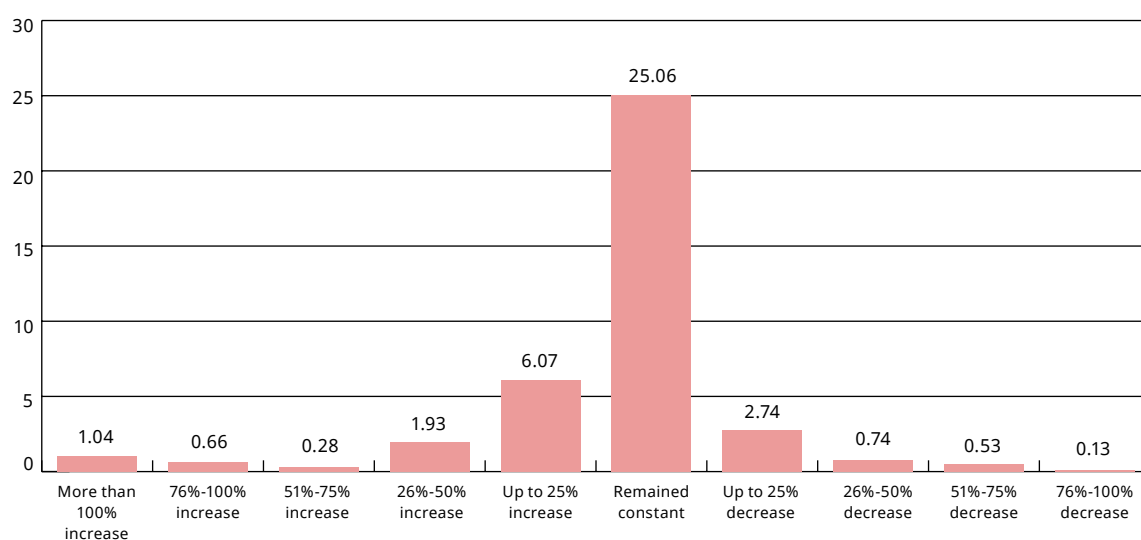
Chart 5.12 – Investment forecast for 2016, by type of course (%)



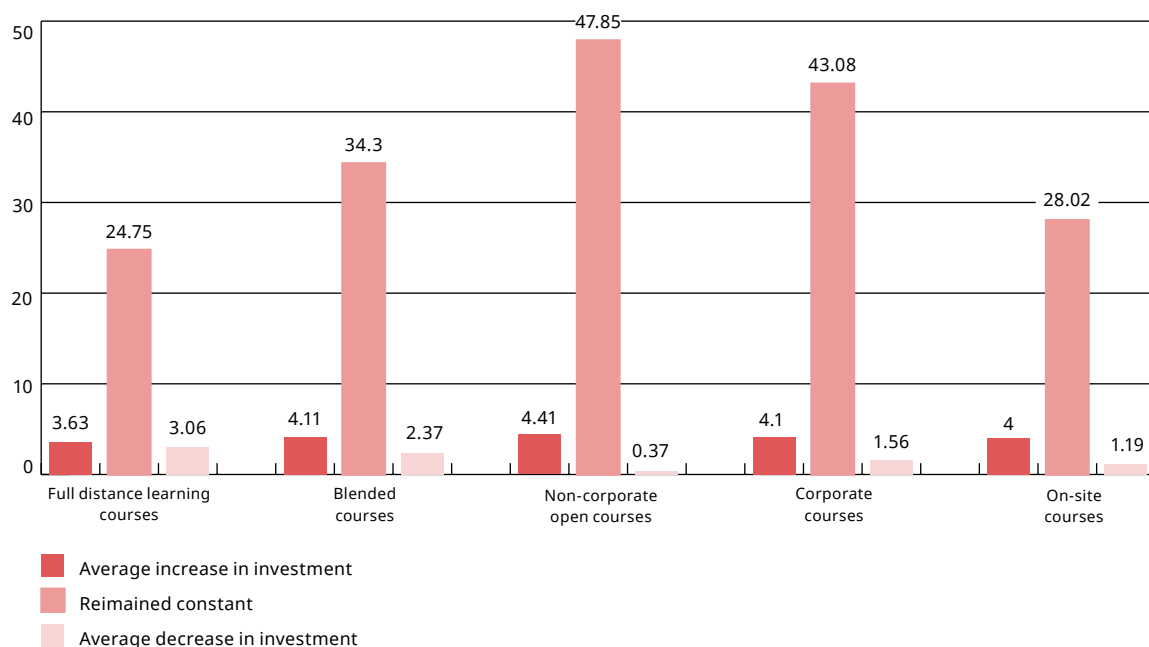
5.3 Income

The institutions' income trend also remained constant: 25.06% of institutions did not see a change in relation to the previous year, while 9.98% of establishments presented an increase in income and 4.14%, a decrease:

Chart 5.13 – Income profile of educational institutions (%)

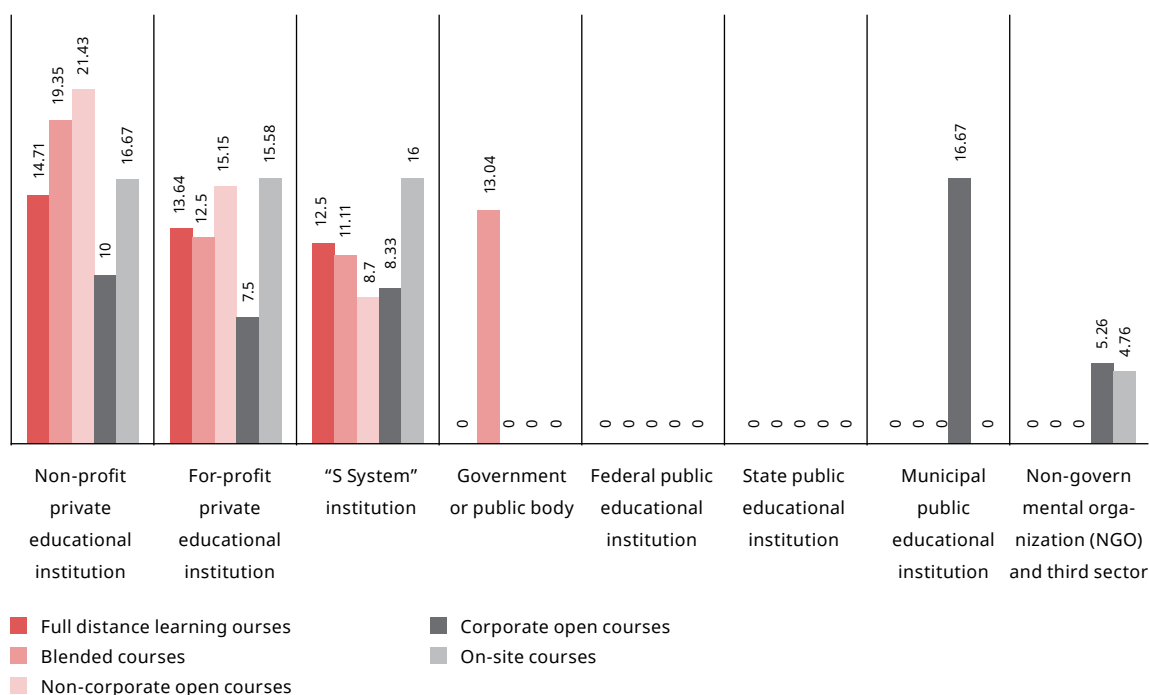


Income of institutions had the same pattern of investments, with higher growth among open courses:

Chart 5.14 – Income profile, by type of course (%)

Among private institutions, 21.43% of non-profit educational institutions and 15.15% of for-profit educational institutions showed an increase in revenues in open courses. The courses had less increase in revenue were corporate, 7.5% to 10% of those indicated that there was increase in income in 2015.

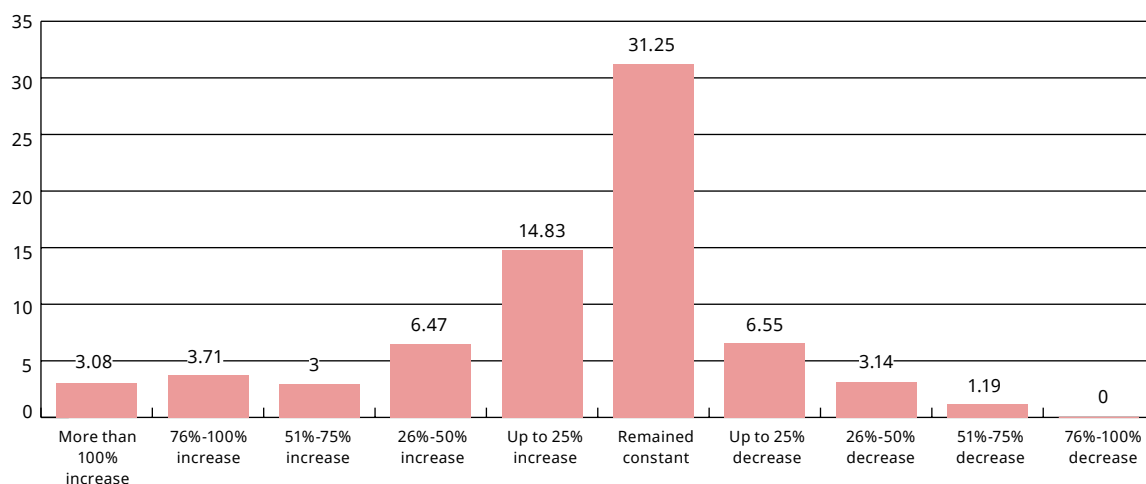
The classroom courses received increased income in approximately 15% of the SNA and private institutions. The fully distance courses were at a slightly lower rate, which ranged between 12% and 15% of the mentioned institutions:

Chart 5.15 – Institutions that reported an increase in income, by type of course (%)

5.4 Enrollments

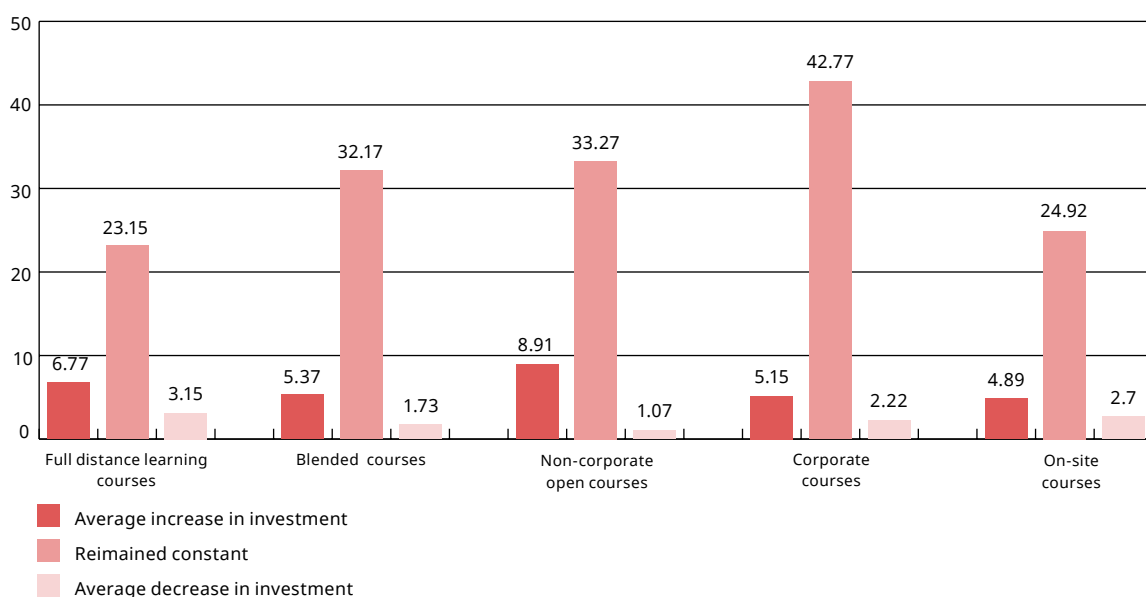
The percentage of institutions that saw an increase in the number of enrollments (31.09%) was practically equivalent to that of institutions that maintained the same count as the previous year (31.05%). On the other hand, 10.88% of institutions saw a decrease in the number of enrollments:

Chart 5.16 – Increase and decrease in enrollments in educational institutions (%)



Similarly to investments and income, the most significant increase in number of enrollments happened in non-corporate open courses:

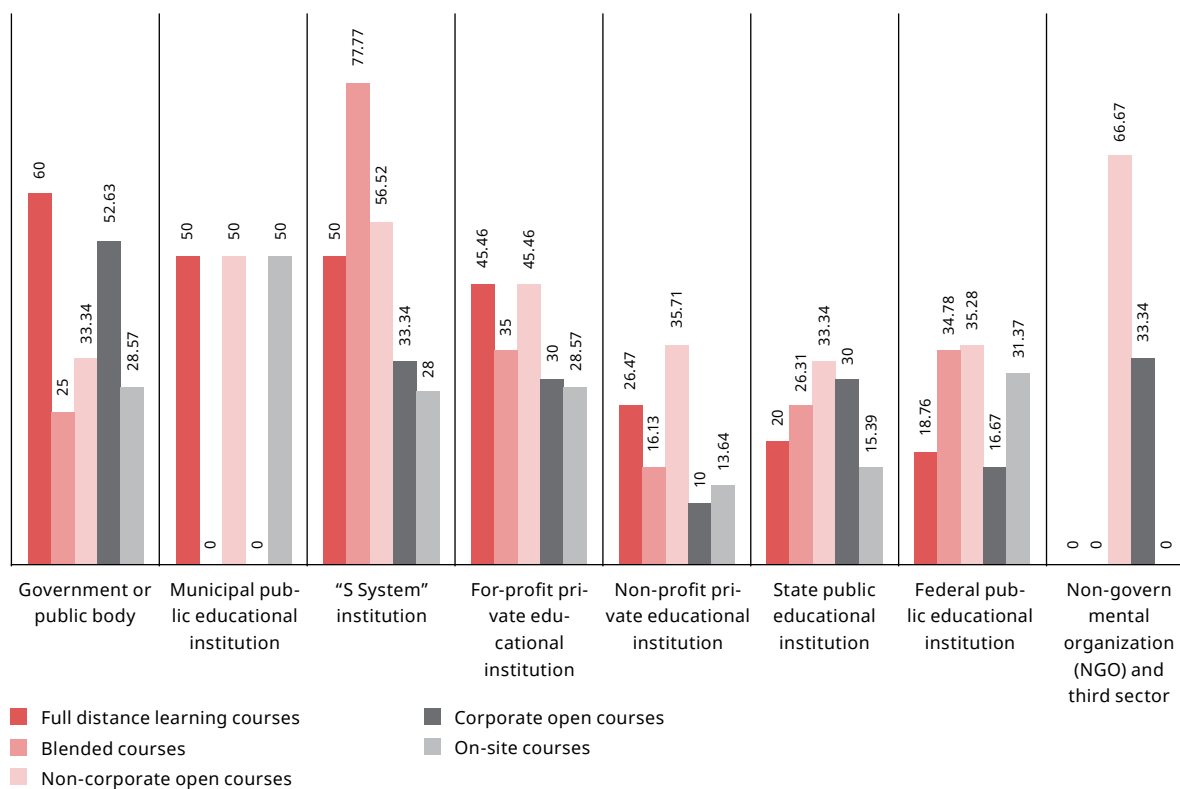
Chart 5.17 – Profile of the volume of enrollments, by type of course (%)



The increase in enrollment in full distance learning courses was significant. In 77.77% of “S System” institutions, there was an increase in enrollment in blended courses. Public bodies, Municipal public educational institutions and for-profit private educational institutions had a significant increase in enrollment in full

distance learning courses, with 60%, 50% and 45.46%, respectively. The open courses stood out in NGOs, which increased enrollments in the range of 66.67%:

Chart 5.18 – Institutions that presented an increase in enrollments, by administrative category (%)



Current practices in distance learning



In this section of the Census, is present how distance learning is carried out with the students, according to the data provided by the participating institutions. The workload of the courses is analysed, as well as the communication, support and resources made available to the students. Where applicable in this chapter, these data are compared with data from on-site courses.

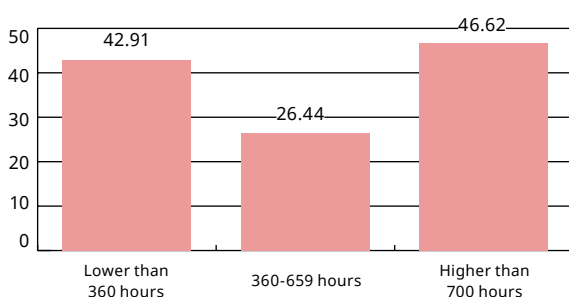
6.1 Workload of distance courses

Below, are present the workloads of the different types of distance courses.

6.1.1 Accredited full distance learning courses

Most institutions offering accredited full distance learning courses organized them with a workload of more than 700 hours. On the other hand, 42.91% of institutions offered courses with less than 360 hours:

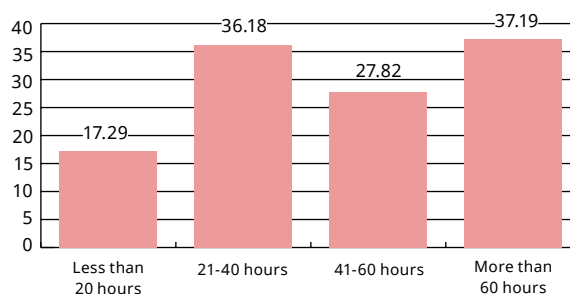
Chart 6.1 – Institutions offering accredited full distance learning courses with workload lower than 360 hours, from 360 to 699 hours, and higher than 700 hours (%)



6.1.2 Disciplines of blended courses

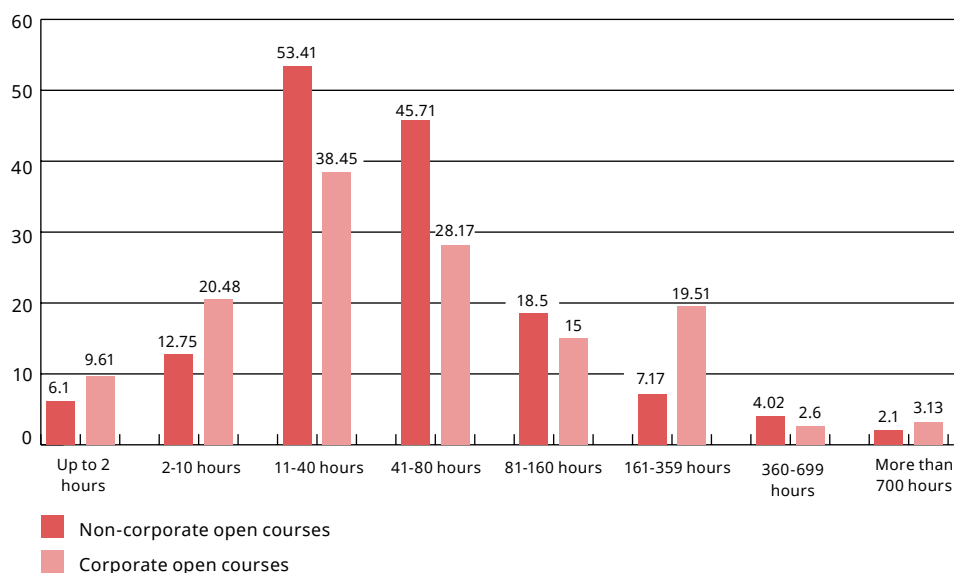
The 37.19% of blended courses offered courses whose disciplines accounted for more than 60 hours. Coming in second are 21-40 hour disciplines, offered by 36.18% of institutions with this course profile:

Chart 6.2 – Institutions offering distance learning disciplines from less than 20 hours to more than 60 hours, by ranges (%)



6.1.3 Open courses

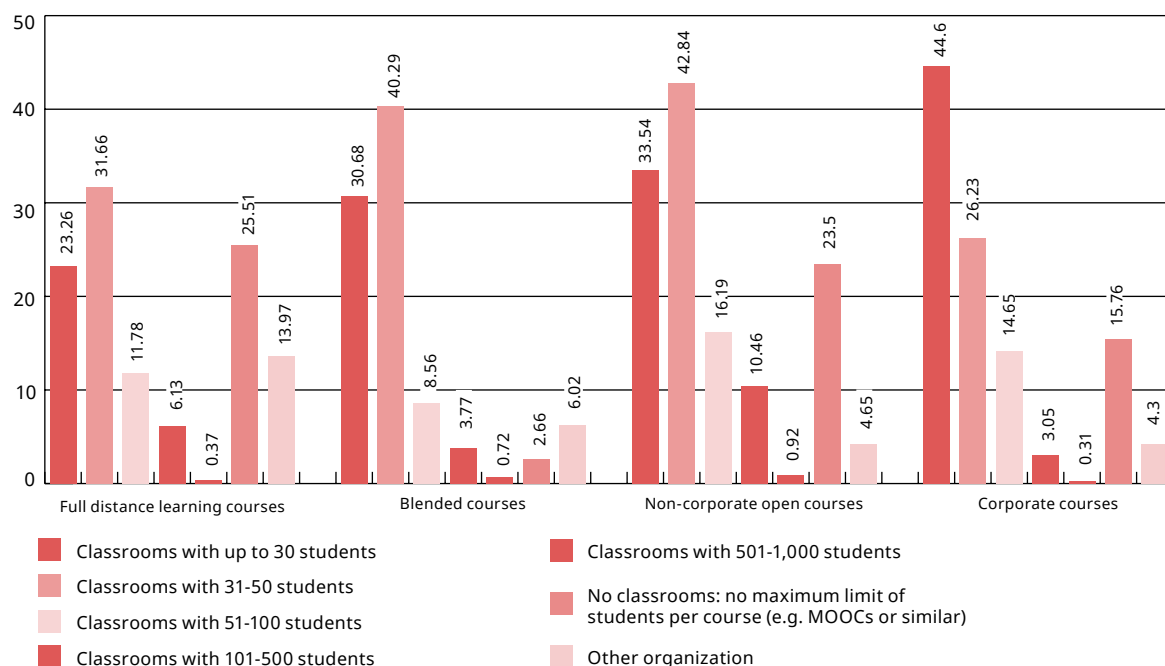
Among open courses, most institutions offered 11-40 hour or 41-80 hour courses: of the establishments that offered non-corporate open courses, 53.41% offered 11-40 hour courses, and 38.45% of institutions that offered corporate courses said they had courses within the same workload profile. As for 41-80 hour courses, the rate was 45.73% of non-corporate courses and 28.17% of corporate courses:

Chart 6.3 – Institutions offering open courses with workloads from less than 2 hours to more than 700 hours

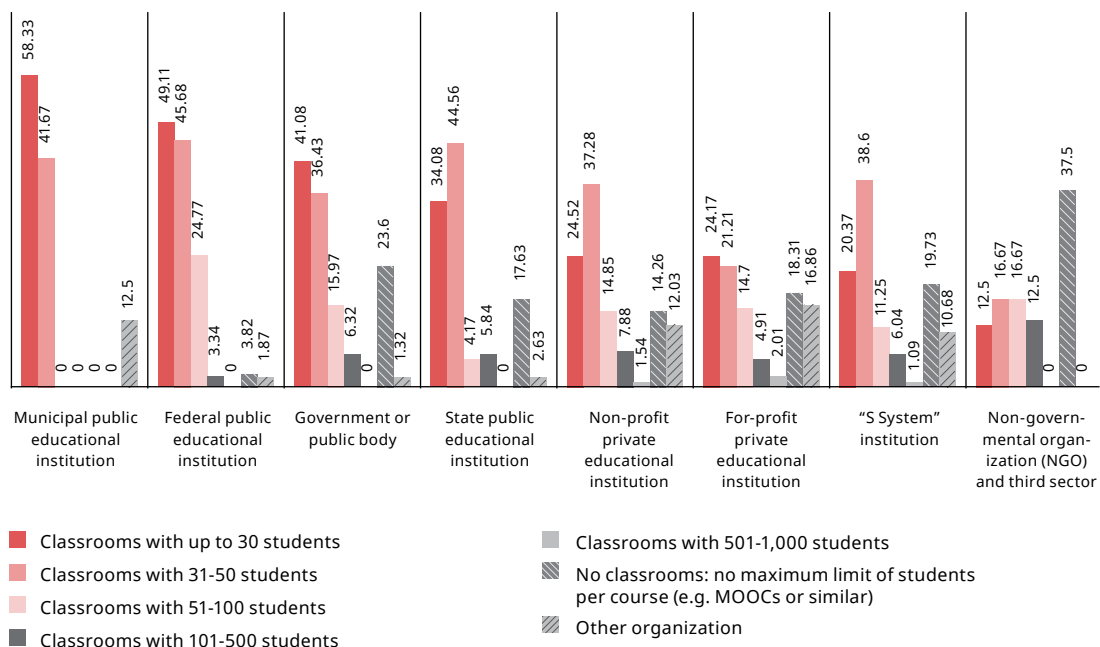
6.2 Classroom organization

Most types of distance courses offered by the institutions participating in this Census organized students into classes of 31 to 50 students: 31.66% of institutions offering accredited full distance learning courses, 40.29% of those offering blended courses, and 42.84% of those with non-corporate open courses had this size of classroom. Corporate courses presented a trend of forming smaller groups: 44.6% of institutions organized their students into classrooms of up to 30 students.

Classes with 500 to 1,000 students were few, but present (all categories less than 1%), and the courses with no limit in the number of students per class, like Massive Open Online Courses (MOOCs), are already a reality in open and full distance learning courses – 15% to 25% of institutions that already offer courses of this type:

Chart 6.4 – Classroom organization, by type of course (%)

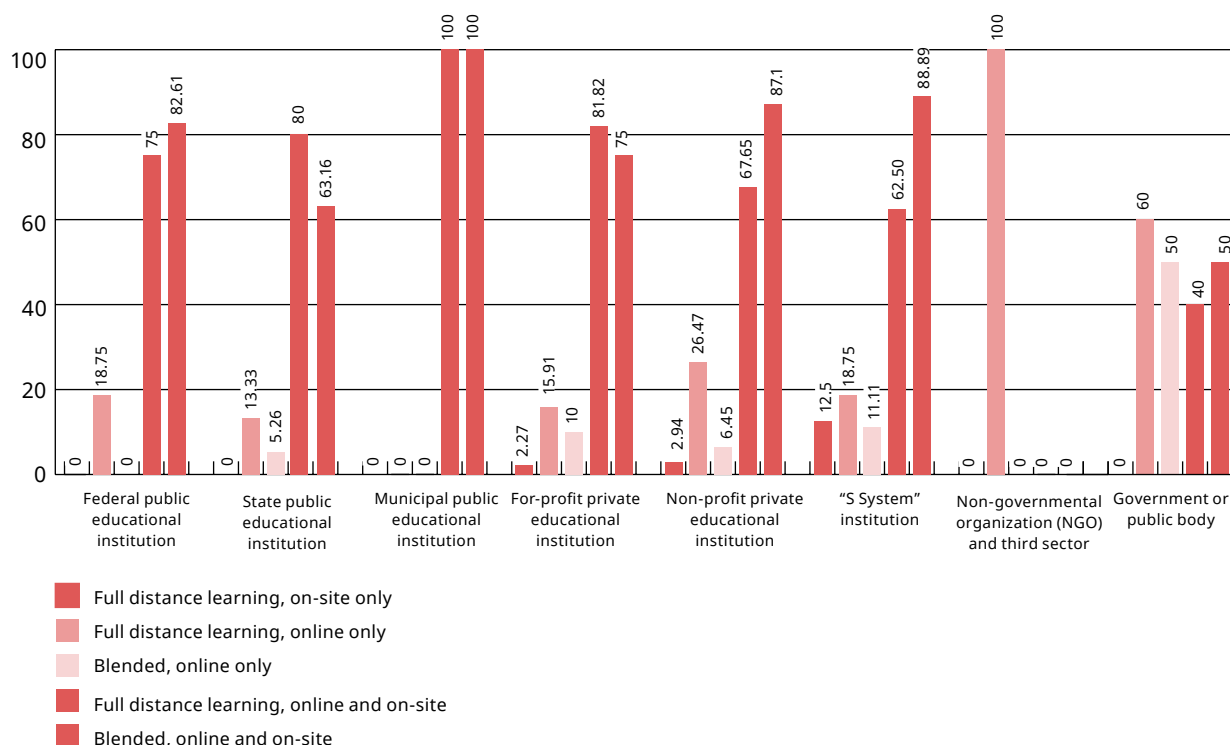
The classroom organization by administrative category, shows that for-profit and non-profit private institutions, public bodies and government, state public educational institutions and “S System” institutions were the ones that most offered alternative organizations. Classes of more than 500 students were only present in private and “S System” institutions:

Chart 6.5 – Classroom organization, by administrative category (%)

6.3 Student support

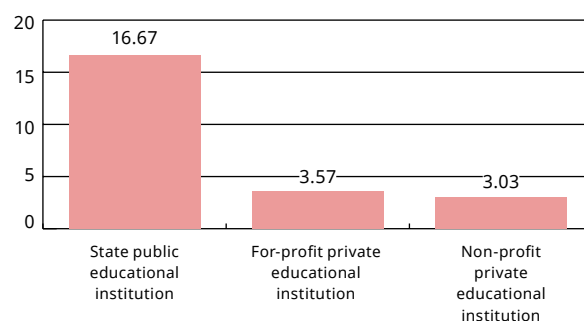
Among accredited full distance learning courses, 12.5% of “S System” institutions offered on-site support; 100% of NGOs offered only online support; and the majority of the others offered the student the option to receive on-site or online support:

Chart 6.6 – Forms of student support, by administrative category (%)

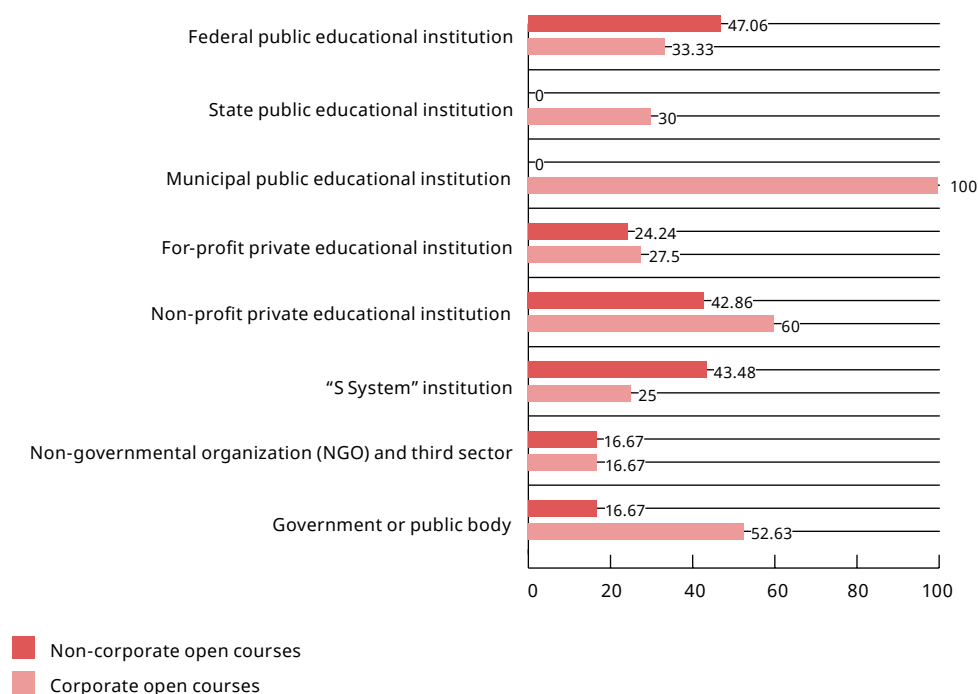


Student support regarding the content of the course was provided by most institutions, with rare exceptions: 16.67% of state institutions, 3.57% of non-profit private institutions; and 3.03% of for-profit private institutions:

Chart 6.7 – Institutions that do not offer student support on the content of open courses, by administrative category (%)



The other institutions provided different offers of online and on-site support in open courses:

Chart 6.8 – Offer of online and on-site support in open courses, by administrative category (%)

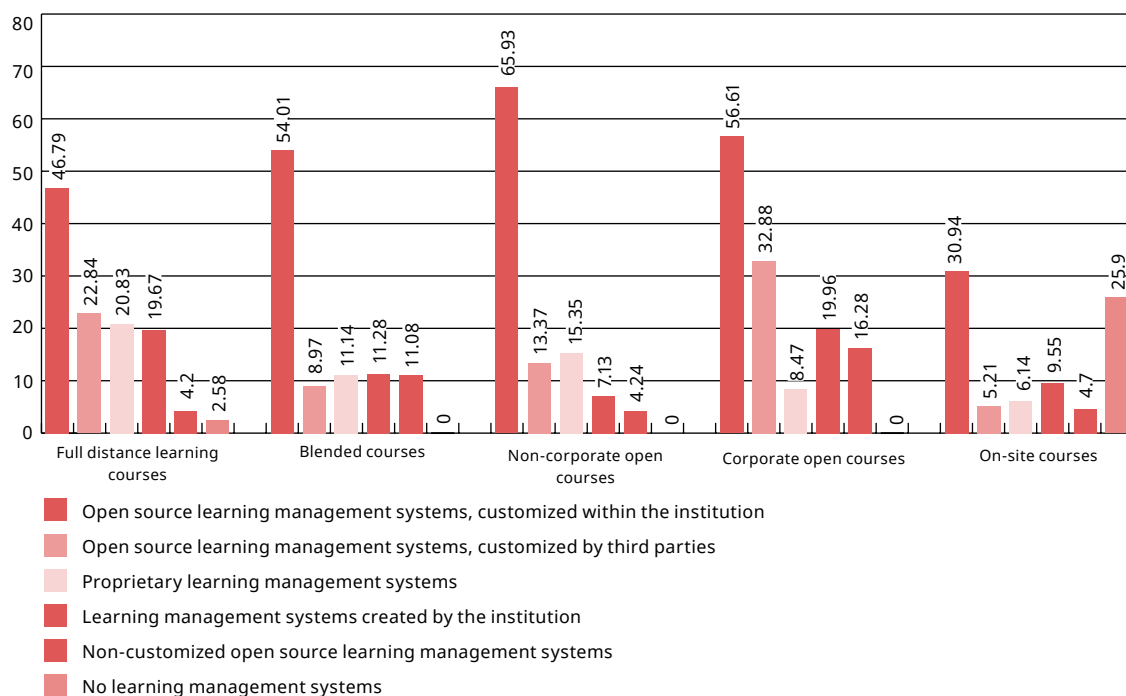
6.4 Learning management system (LMS)

The Learning management system (LMS), customized within the institution were present in 46.79% of distance courses, as well as in 30.94% of institutions that offer on-site courses.

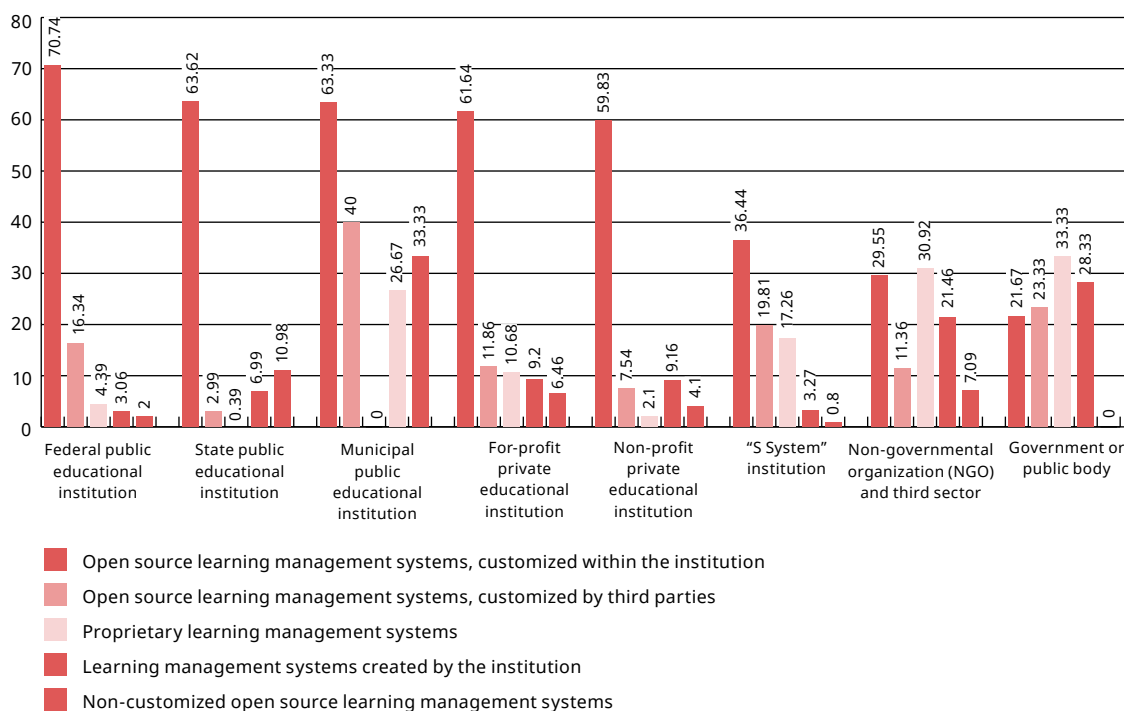
In accredited full distance learning courses, institutions preferred open source virtual learning

environments customized within the institution (46.79%), followed by open source customized by third parties (22.84%). In third, we have proprietary learning management systems (20.83%), and fourth, those developed within the institution (19.67%).

Non-customized, open source learning management systems were used by 4.2% to 11.08% of institutions:

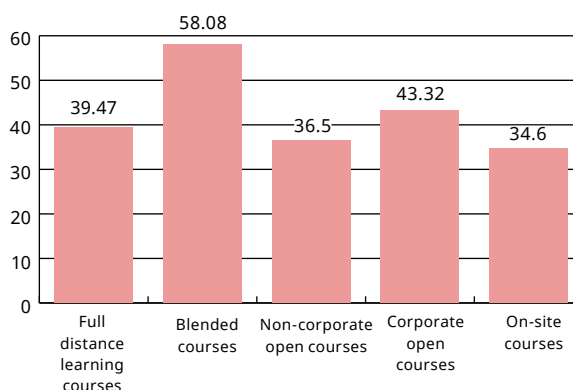
Chart 6.9 – Option for learning management systems, by type of course (%)

Among the different administrative categories, the most significant adoption of proprietary learning management systems occurred in government or public body (33.33%), NGOs (30.92%), “S System” institutions (17.26%) and for-profit private institutions (10.68%):

Chart 6.10 – Option for open source or proprietary learning management systems, by administrative category (%)

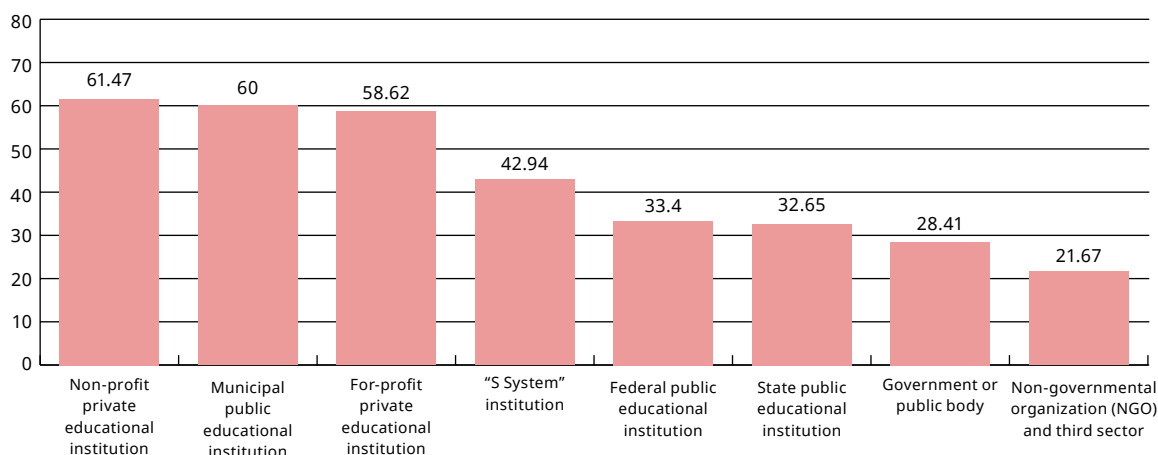
Integrating a learning management system into the academic system is not yet standard. Institutions that present such integration varied from 34.6% to 58.08%, according to type of course. The most integrated were blended courses:

Chart 6.11 – Institutions that integrate their learning management system to their academic system, by type of course (%)



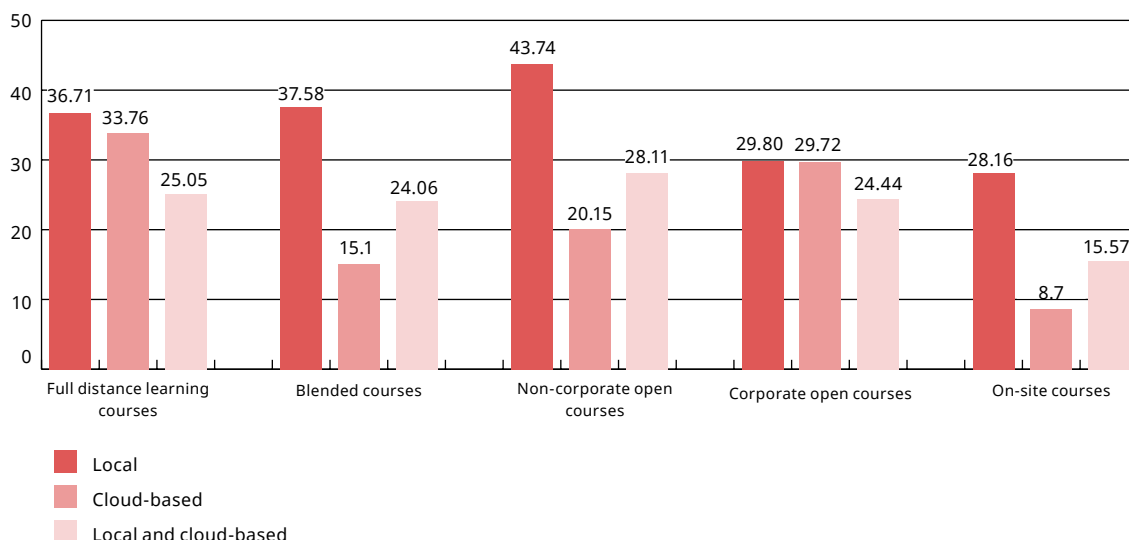
The administrative categories in which this integration was the most notable were non-profit private institutions (61.47%), municipal public institutions (60%) and for-profit private institutions (58.62%):

Chart 6.12 – Institutions that integrate their learning management system to their academic system, by administrative category (%)



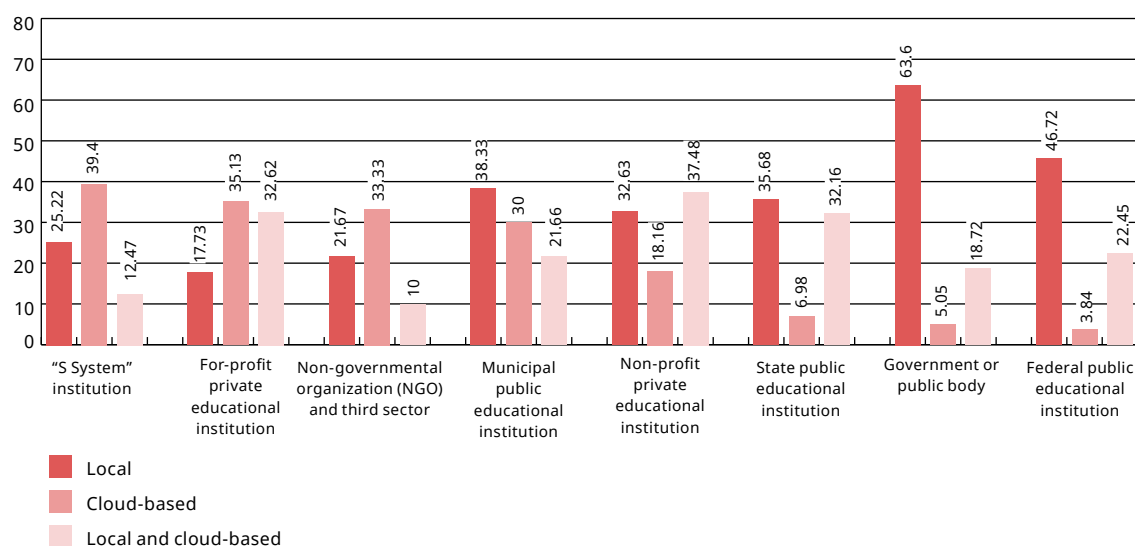
Implementation of learning management system was mostly local. On the other hand, full distance learning courses were the major adopters of cloud-based implementation (33.76%):

Chart 6.13 – Option of institutions for local or cloud-based implementation, or both, by type of course (%)



Among the administrative categories that chose the cloud, we have had 39.4% of “S System” institutions and 35.13% of for-profit private institutions:

Chart 6.14 – Option of institutions for local or cloud-based implementation, or both, by administrative category (%)



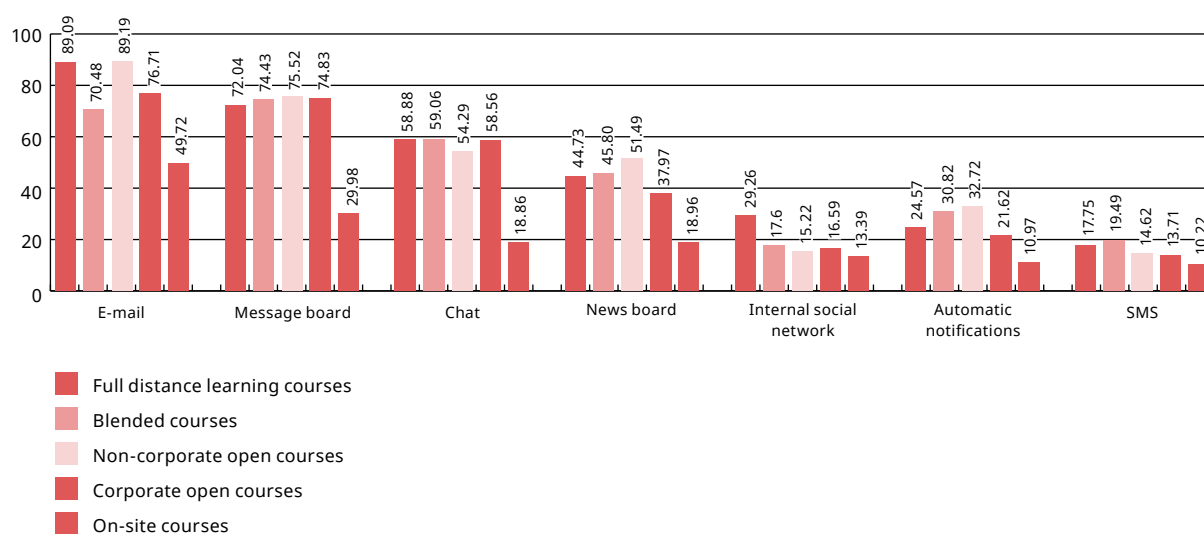
6.5 Communication on the LMS

Among the means of communication of the LMS used to connect with the students, we have observed that institutions presented a tendency to use all communication options available to them.

A little variation was observed regarding administrative categories. However, in terms of type of course, accredited full distance learning courses showed a tendency to explore the available resources more frequently: 89.09% of institutions used email, 72.04% used message boards, 58.88% used chats, 44.73% used newsboards, 29.26% used an internal social network, 24.57% used automatic notifications and 17.75% used SMS.

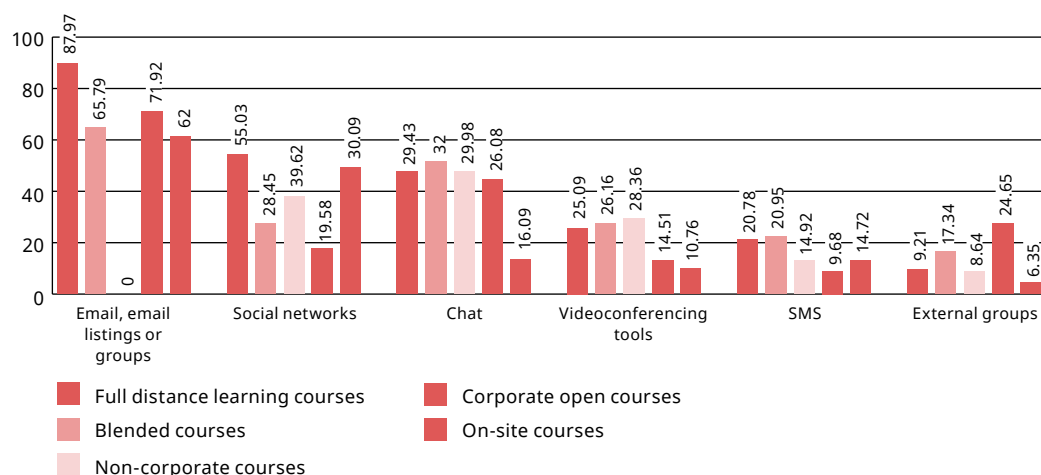
On-site courses also used all of these resources but to a lesser extent (49.72%, 29.98%, 18.86%, 18.96%, 13.39%, 10.97%, and 10.22%, respectively):

Chart 6.15 – Means of communication of the learning management systems used by institutions in student communications, by type of course (%)



In terms of external tools to AVA, the most used is the e-mail (87.97% of institutions that offer full distance learning courses use this feature). However, the institutions that offer corporate open courses don't use external email to the learning environment.

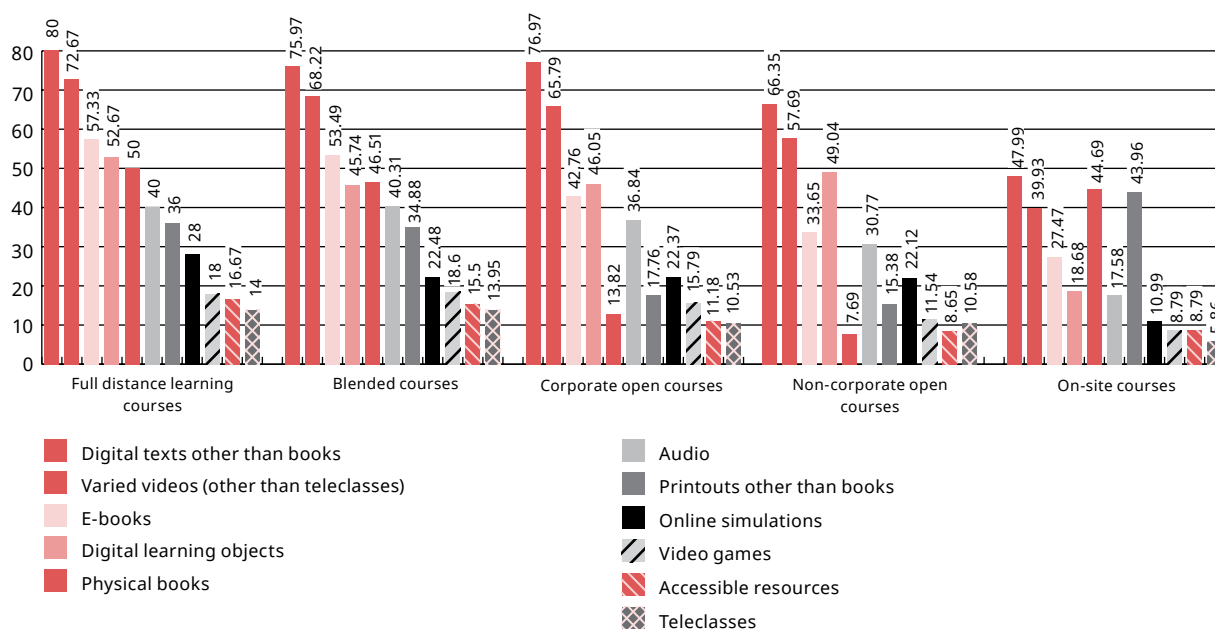
Chart 6.16 – Means of communication external to the learning management systems used by institutions, by type of course (%)



6.6 Course content support

The materials used for presenting content on distance learning courses are many and, once again, accredited full distance learning courses explored the highest variety of materials. On-site courses also profited from varied resources, but to a lesser extent than distance courses:

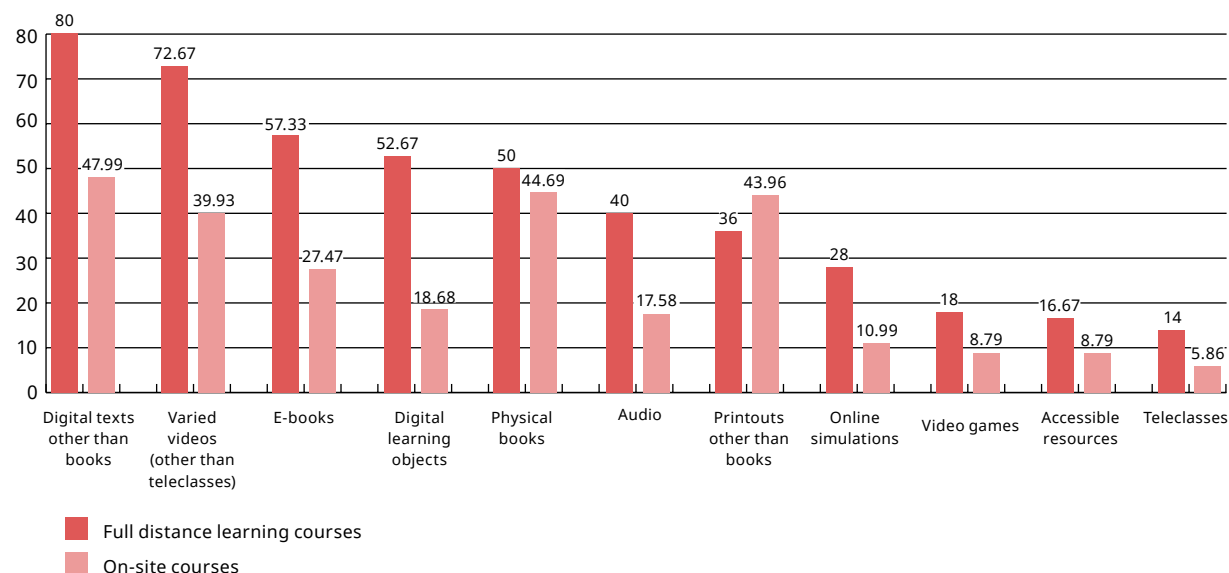
Chart 6.17 – Types of content used in the different modalities of courses (%)



If we compare only content presentation resources used by accredited full distance learning courses and those made available by on-site courses, the differences between the two modalities is clearer: distance courses used

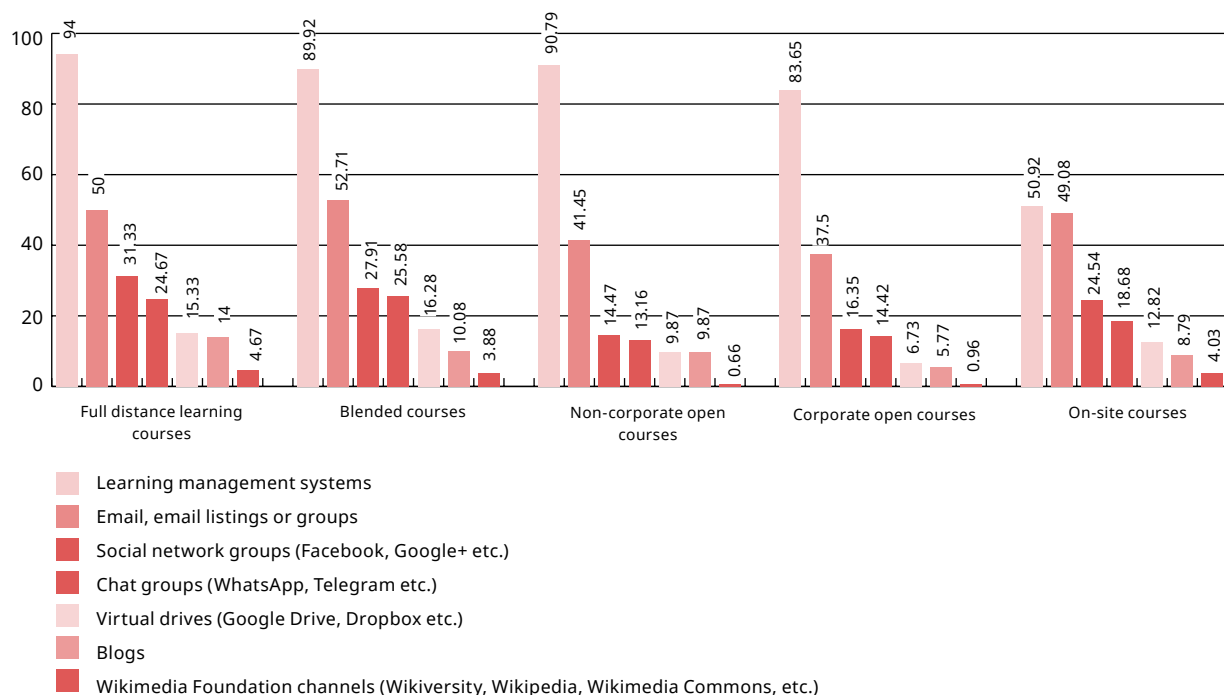
all types of resources, including physical books, more frequently. The only exception was for print handouts other than books, used by 43.96% of institutions on on-site courses and 36% of institutions offering accredited full distance learning courses.

Chart 6.18 – Comparison of materials used in accredited full distance learning and on-site courses (%)



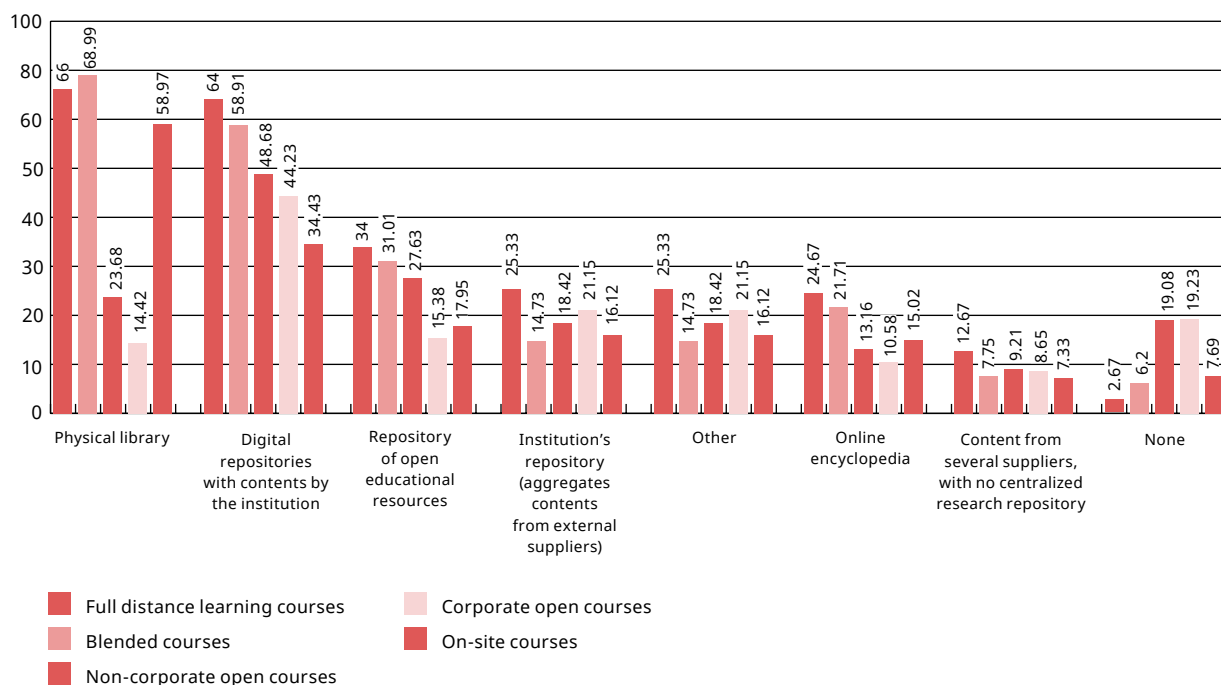
The digital resource sharing tools adopted in the different types of courses reinforced the pattern of greater variety of resources destined to students of accredited full distance learning courses. Alternatively, we can also state that on-site courses are already adopting technological resources typical of distance learning, although to a lesser extent:

Chart 6.19 – Digital resource sharing tools adopted in the different types of courses (%)



The higher diversity of materials offered to students in distance courses when compared to on-site was confirmed in what comes to the content repositories made available to the students, highlighting physical libraries, offered at 66% of institutions that offered accredited full distance learning courses, and in 58.97% of institutions that offered on-site learning:

Chart 6.20 – Types of content repositories used in the different types of courses (%)



Parte 7

Profile of supplying institutions



The 2015 Brazilian Census for Distance Learning had the voluntary participation of 69 supplying institutions. (We stress that, of the establishments mentioned, 40 are also educational, which means that learning institutions are growing their operations to also supply products and services to other institutions.)

7.1 Place of origin

Among the institutions and companies that participated in this Census, we have observed a higher concentration of companies in the Southeast when compared to educational institutions (58% of participants):

Chart 7.1 – Regions where supplying companies and institutions are located (%)

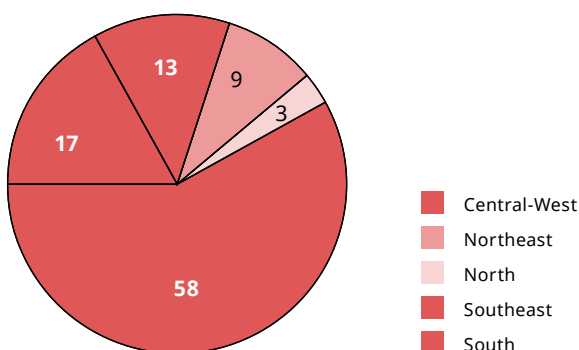
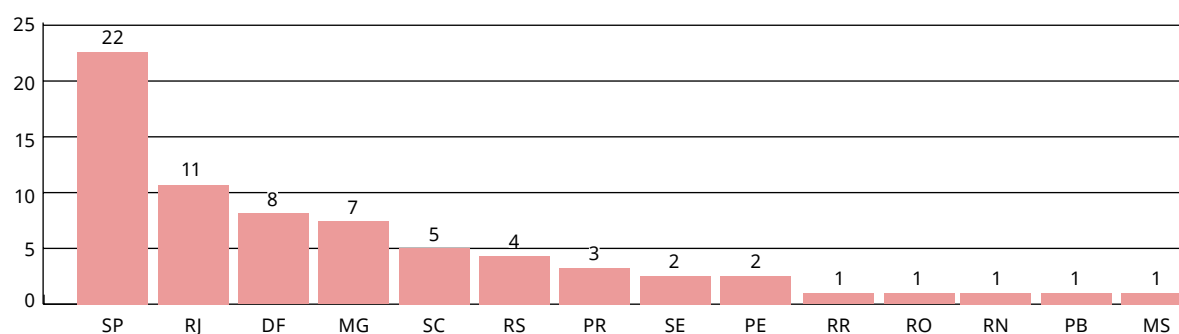


Chart 7.2 – States where supplying companies and institutions are located (in absolute numbers)

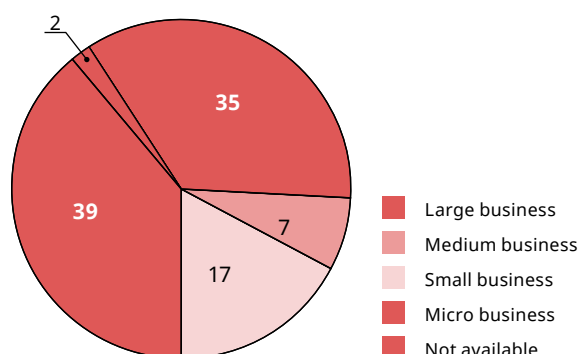


7.2 Size

As for their size, we have noticed that the percentage of large businesses and micro businesses is similar, representing 35% and 39% of participating institutions, respectively. Small and medium businesses were also represented, with 7% and 17% of participants, respectively.

According to the criteria used in this Census, company size is defined as follows:

- Micro business (up to 9 employees for services and commerce; up to 19 for industry);
- Small business (10 to 49 employees for services and commerce; 20 to 99 for industry);
- Medium business (50 to 99 employees for services and commerce; 100 to 499 for industry);
- Large business (over 100 employees for services and commerce; over 500 for industry).

Chart 7.3 – Size of supplying institutions (%)

7.3 Main activity

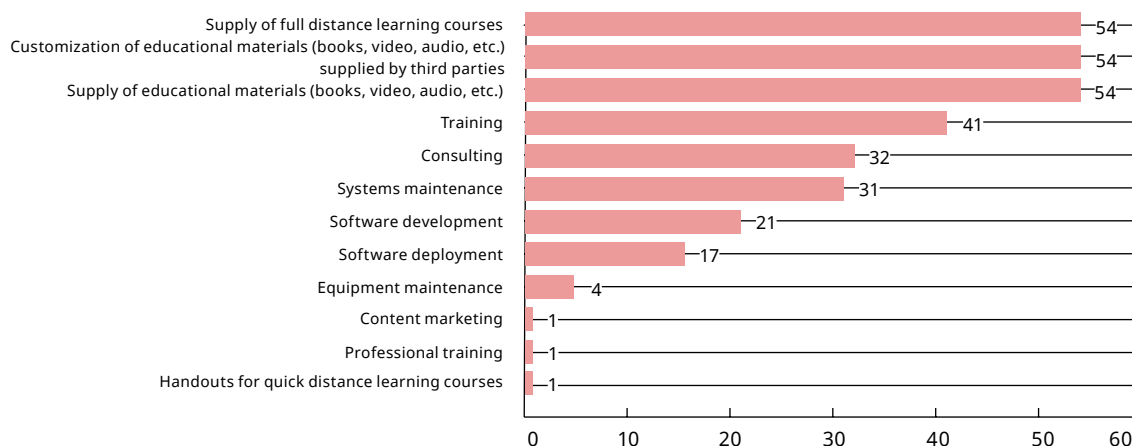
The main activities of supplying companies varied largely. Highlights were the editorial field – print or digital content production –, followed by software production, with 47 and 12 participants, respectively.

In addition, we had 7 audiovisual production suppliers, 4 hardware suppliers, 3 graphic printing companies, 2 educational and 2 cloud-based services¹, among others.

A detailed picture of the activities of suppliers participating in this Census can be seen in Table 7.4, in the Annex II of this Census.

Within their respective activities, 54 institutions or companies supply educational materials (books, video, audio etc.), customize educational materials (books, video, audio etc.) supplied by other companies, and supply finished distance learning courses. We noted a strong trend to outsource the service of content and course creation.

Moreover, there is a strong presence of companies providing training (41), consulting (32), systems maintenance (31), software development (21), software deployment (17) and equipment maintenance (4).

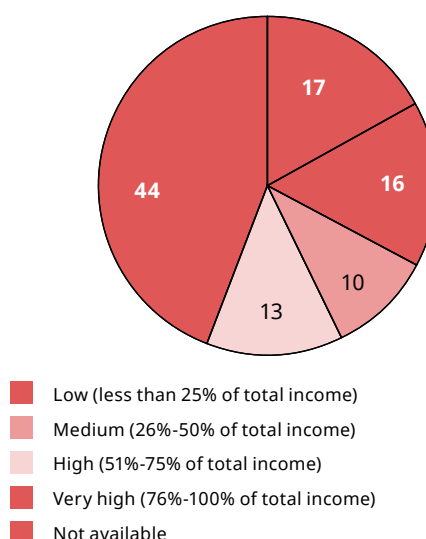
Chart 7.4 – Number of companies that provide services for the distance learning market (in absolute numbers)

¹ When the software installation is “cloud-based”, available anywhere on the planet, rather than only on servers located within the institutions.

7.4 Income: investments and clients

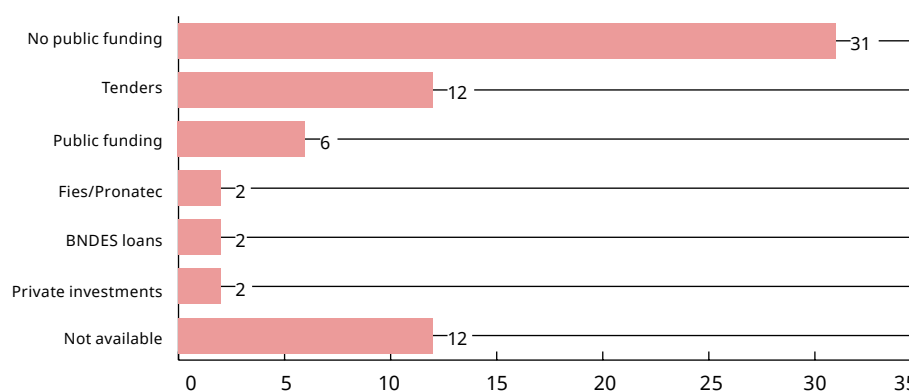
The companies who participated in the 2015 Brazilian Census for Distance Learning clearly see in distance learning an important, but not exclusive source of income: 44% of companies and institutions make 76%-100% of their income from distance courses. However, we also have the following scenario: 16% of Census participants declared depending on distance learning for less than 25% of their income; 10% declared depending on it for 26%-50% of it; and 13% said they extract 51-75% of their income from distance learning:

Chart 7.5 – Importance of distance learning in the income of supplying institutions (%)



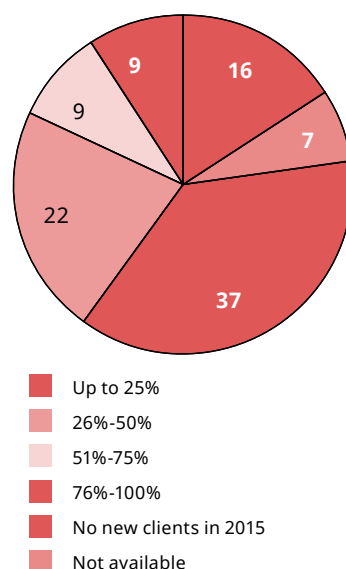
Supplying institutions have shown a tendency to present low dependency on public or private funds (31 participants did not receive any funding of this nature). Of the establishments that did, 12 came from public tenders, 6 from public trusts, 2 from loans from the National Bank for Social Development (BNDES), and 2 from grants from the Student Finance Fund (Fies) and the National Program for Access to Technical Education and Employment (Pronatec). Only 2 institutions or companies were funded by private investments:

Chart 7.6 – Source of income of supplying institutions (in absolute numbers)

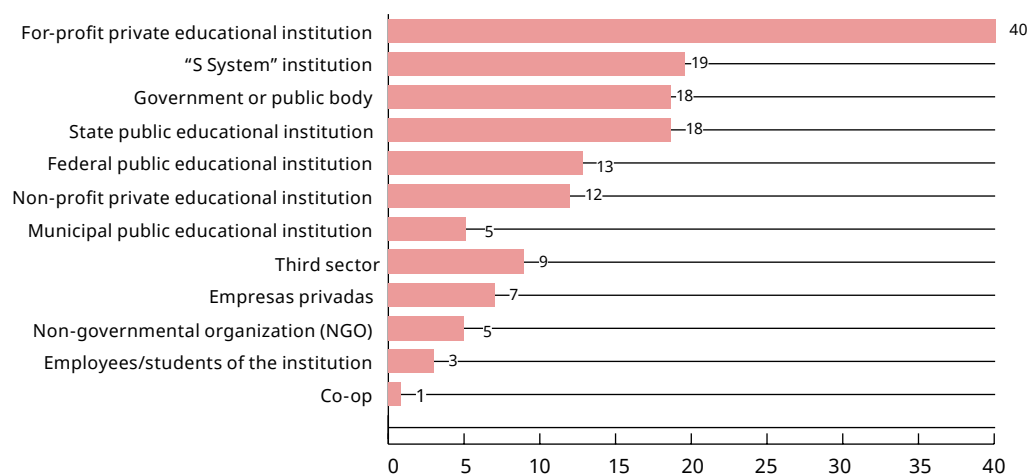


Clients are, therefore, the most important source of income of supplying institutions: the 37% of them saw an increase in up to 25% in the number of clients (it is noteworthy that, in 2015, even larger growths were recorded: 22% had a 26%-50% increase in the

number of clients, 9% saw a 51%-75% increase, and 9% had a 76%-100% increase). The 16% of companies, on the other hand, did not see their number of clients grow this Census:

Chart 7.7 – Increase in the number of clients of supplying institutions (%)

The client base of supplying institutions is quite large, represented by a variety of administrative categories. As clients, we highlight for-profit private institutions (40 institutions supply to this administrative category), the “S System”, with 19 suppliers, and public bodies or government, with 18 suppliers:

Chart 7.8 – Clients serviced by supplying companies and institutions, by administrative category and number of suppliers (in absolute numbers)

7.5 Licensing

The supplying institutions appear to not have adhered to open licensing, such as Creative Commons or CC-BY. Only 6 institutions or companies practiced this type of licensing, while 28 used standard copyright and 20 have fully transferred their rights to the content buyer (see Table 7.10).

The same goes for software licensing: among the 28 participating establishments, 24 institutions adhered standard copyright, all rights reserved, and 9 institutions practice alternative licensing, such as GNU, the National Institute for Industrial Production (Inpi), Software as a Service (SaaS) or Lesser General Public Licence (LGPL) (see Table 7.11).

7.6 Challenges faced by supplying institutions

The perception of supplying institutions regarding the challenges they face is not as acute, on average, as that of educational institutions. In a 1-5 Likert scale, where agreement with a 2.5 average is rather significant, there were only 4 items that caused this high level of agreement: difficulty winning tenders (2.68), high production cost (2.6), decrease of demand (2.57) and the client's lack of understanding of their own needs for products and services (2.53).

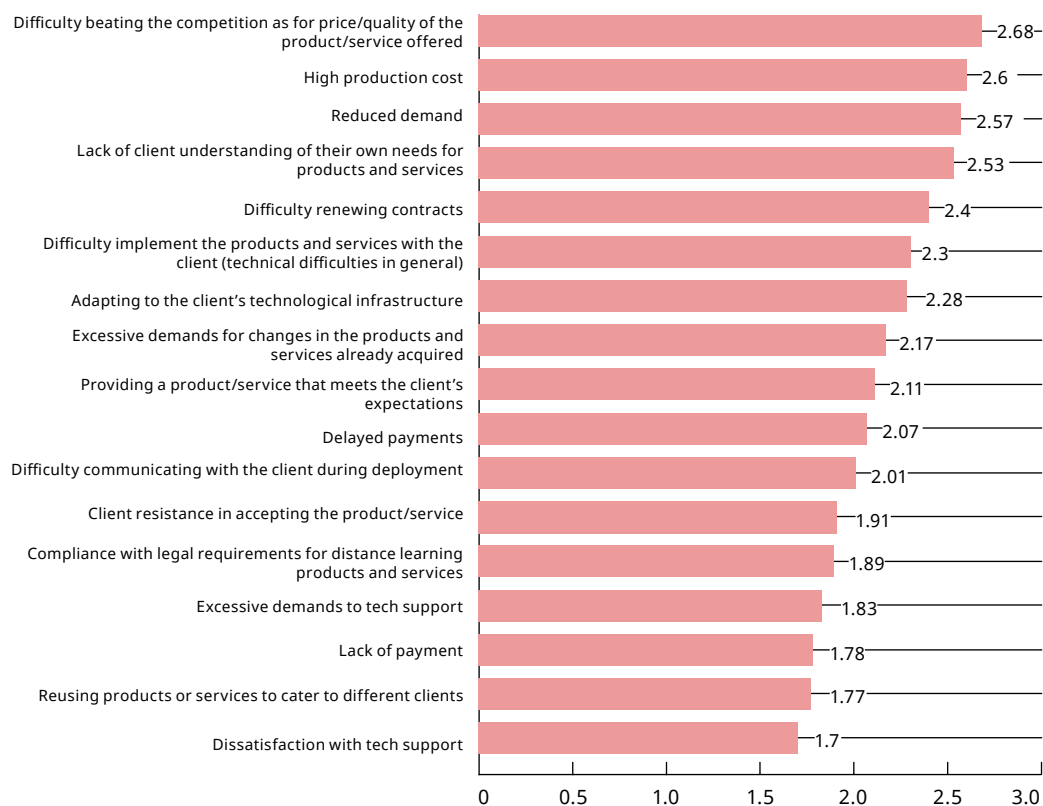
We see, therefore, an increase in competition, economic difficulties due to production cost and reduced demand, and a higher need to align the supplier and the new client regarding expectations and needs.

Everyday issues were also noted: difficulties renewing contracts, implementing products and services, adapting to the clients' infrastructure or catering to their excessive demands, delayed payment and difficulties communicating with the client. However, on average, supplying institutions tend to disagree that these are significant problems.

The items that caused the least concerns to supplying institutions were client resistance, compliance with legal requirements, excessive technical support demands, the possibility to reuse offers with different clients, and lack of payment.

This scenario suggests that supplying institutions participating in this Census appear to know what to supply and how to cater to their current clients without further difficulties; on the other hand, these companies seem to face a few challenges to attract new clients and expand their business, whether for reasons of competition, finances or communication on the advantages of their products and services:

Chart 7.9 – Opinion of supplying institutions on the challenges faced in 2015 (in 1-5 Likert scale)



Annexes

Annex I – Institutions participating in the 2015 Brazilian Census of Distance Learning

Institution	State	Institution	Email	Contact name	Link
Educational/ Supplying	DF	Universidade de Brasília – UNB	diretoria@ead.unb.br	Josué Berto dos Santos Junior	www.ead.unb.br
Educational/ Supplying	DF	Centro de Ensino Tecnológico de Brasília – CETEB	escolaceteb@ceteb.com.br	Ana Paula Porfírio de Souza	www.ceteb.com.br
Educational/ Supplying	DF	Mais E-Duc Solução em Educação a Distância	atendimento@maiseduc. com.br	Cássio Murilo Alves Costa	www.maiseduc.com.br
Educational/ Supplying	DF	Serviço Federal de Processamento de Dados – SERPRO	admin.moodle@serpro.gov. br	Márcio de Araújo Benedito	https://moodle.ead. serpro.gov.br
Educational/ Supplying	DF	Unicanto Supletivo	unicanto@colegiunicanto. com.br	Paulo Saenger	www.supletivounicanto. com.br
Educational/ Supplying	DF	Avante Brasil Informática e Treinamentos	romulo@avantebrasil.com.br	Romulo Moura Afonso	www.avantebrasil.com. br
Educational/ Supplying	DF	Strong Edições	strongedicoes@gmail.com	Elias do Nascimento Melo Filho	www.strongedicoes. com
Educational/ Supplying	DF	Raleduc Tecnologia e Educação	adm@raleduc.com.br	Rafael Lacerda	www.raleduc.com.br
Educational/ Supplying	MG	Universidade do Estado de Minas Gerais – UEMG	coordenadoria.ead@uemg.br	Priscila Rondas Ramos Cordeiro Torres Fontes	www.uemg.br
Educational/ Supplying	MG	Instituto Federal do Sudeste de Minas Gerais – Campus Juiz de Fora – IFSUDESTEMG	ead.jf@ifsudestemg.edu.br	Francisco Clarete Pereira Vieira	www.jf.ifsudestemg. edu.br
Educational/ Supplying	MS	Portal da Educação S/A	atendimento@ portaleducacao.com.br	Guilherme Dias	www.portaleducacao. com.br
Educational/ Supplying	PB	Universidade Federal de Campina Grande – UFCG	reitoria@reitoria.ufcg.edu.br	Edjane Esmerina Dias da Silva	www.ufcg.edu.br
Educational/ Supplying	PR	Universidade Estadual de Londrina – UEL	proplandaai@uel.br	Martha Aparecida Santana Marcondes	www.uel.br

(to be continued)

Institution	State	Institution	Email	Contact name	Link
Educational/ Supplying	PR	Faculdade Educacional Araucária – FACEAR	murilo@facear.edu.br	Osiris Manne Bastos	www.facear.edu.br
Educational/ Supplying	RJ	Instituto de Pesquisas Avançadas em Educação – IPAE	instituto@ipae.com.br	Sergio Henrique Ribeiro de Souza	www.ipae.com.br
Educational/ Supplying	RJ	Universidade Unigranrio	atendimento.ead@ unigranrio.com.br	Jeferson Pandolfo	www.unigranrio.br
Educational/ Supplying	RJ	Ecthos CD	marcus.possi@ecthos.com.br	Marcus Possi	www.ecthoscd.com.br
Educational/ Supplying	RJ	Fundação Getulio Vargas – FGV	mary.murashima@fgv.br	Eliane Masseno de Pinho	portal.fgv.br
Educational/ Supplying	RJ	Centro de Tecnologia da Indústria Química e Têxtil – SENAI – CETIQT	cead@cetiqt.senai.br	Paula Celestino de Almeida	www.portaldaindustria. com.br/senai/canal/ senaicetiqt
Educational/ Supplying	RJ	Instituto Interativo Educacional	interativoeducacional@ gmail.com	Claudia Valeria Nobre Leyendecker	
Educational/ Supplying	RJ	Serviço Nacional de Aprendizagem Industrial – SENAI/RJ	faleconosco@firjan.org.br	Edson de Melo	www.firjan.com.br
Educational/ Supplying	RN	Prosperre – Instituto Tecnológico Brasileiro – ITB	itb.expansao@gmail.com	Leideana Bacurau	www.sistemaitb.com.br/ home#cursoshome
Educational/ Supplying	RO	Instituto Federal de Educação, Ciência e Tecnologia de Rondônia – IFRO	reitoria@ifro.edu.br	Ariádne Joseane Félix Quintela	www.ifro.edu.br
Educational/ Supplying	RR	Serviço Nacional de Aprendizagem Industrial – SENAI/RR	senai@rr.senai.br	Rafael dos Santos Sousa	www.rr.senai.br
Educational/ Supplying	RS	Universidade Federal do Rio Grande – UFRG	reitoria@furg.br	Marisa Musa Hamid	www.furg.br
Educational/ Supplying	RS	C M C Pozo Educacional	cmcpozo@gmail.com	Carlos Manoel Cardoso Pozo	carlos-pozo.net
Educational/ Supplying	RS	CERES – Tecnologia e Educação a Distância	contato@ceres.pro.br	Pricila Kohls dos Santos	www.ceres.pro.br
Educational/ Supplying	SC	Serviço Nacional de Aprendizagem Industrial – SENAI/SC	senai@sc.senai.br	Selma Kovalski	www.sc.senai.br
Educational/ Supplying	SE	Universidade Tiradentes – UNIT	nead@unit.br	Jane Luci Ornelas Freire	www.unit.br
Educational/ Supplying	SE	Alfama Processamento de Dados – ALFAMACURSOS	cursosestecnicos@ alfamacursos.com.br	Alessandra Oliveira Santos	www.alfamacursos. com.br

Institution	State	Institution	Email	Contact name	Link
Educational/ Supplying	SP	Focus Escola de Fotografia	cursos@focusfoto.com.br	Enio Leite	www.focusfoto.com.br
Educational/ Supplying	SP	Educação Livre	contato@educacaolive.com.br	Juliana Galhardi Martins	www.educacaolive.com.br
Educational/ Supplying	SP	Fundação Instituto de Administração – FIA	fia@fia.com.br	Fabio Marinho dos Santos	www.fia.com.br
Educational/ Supplying	SP	Fundação Telefônica	fu.lin@telefonica.com	Fu Kei Lin	www.fundacaotelefonica.org.br
Educational/ Supplying	SP	Meban Metodologia Bancária Ltda.	l.a.titton@gmail.com	Luiz Antonio Titton	www.jogos-de-empresas.com.br
Educational/ Supplying	SP	Site Educacional	site@siteeducacional.com.br	Julia Moreira Kenski	www.siteeducacional.com.br
Educational/ Supplying	SP	Centro Universitário São Camilo	ead@saocamilo-sp.br	Raquel Acciarito Motta	www.saocamilo-sp.br
Educational/ Supplying	SP	Sistema de Ensino Dr. Micro	drmicro@drmicro.com.br	Jefferson Dousseau	www.drmicro.com.br
Educational	AC	Serviço Nacional de Aprendizagem Industrial – SENAI/AC	senai@senaiaac.org.br	Antoine Alexsandra Nefertiti Souza de Melo	www.senaiaac.org.br
Educational	AC	Instituto Federal de Educação, Ciência e Tecnologia do Acre – IFAC	ead@ifac.edu.br	Victor Antunes Vieira	www.ead.ifac.edu.br
Educational	AC	Instituto Estadual de Educação Profissional e Tecnológica Dom Moacyr Grechi – IDEP	gabinete.idmac@gmail.com	Anna Lúcia Leandro de Abreu	www.idep.ac.gov.br
Educational	AC	Universidade Federal do Acre – UFAC	reitoria@ufac.br	Adriane Corrêa da Silva	www.ufac.br
Educational	AL	Corpo de Bombeiros Militar de Alagoas – CBM/AL	luizaugusto.lira@bombeiros.al.gov.br	Luiz Augusto de Medeiros Lira	www.cbm.al.gov.br
Educational	AL	Universidade Federal de Alagoas – UFAL	gr@reitoria.ufal.br	Ilson Mendonça Soares Prazeres	www.ufal.edu.br
Educational	AL	Instituto Federal de Alagoas – IFAL	anacristina.ifal@gmail.com	Ana Cristina Nascimento Cavalcante Vieira	www.ead.ifal.edu.br
Educational	AM	Instituto de Ensino Superior da Amazônia – FMF	msantos41@fmf.edu.br	Giorgio Souto Gonçalves	www.faculademartha falcao.edu.br

Institution	State	Institution	Email	Contact name	Link
Educational	AM	Centro Universitário do Norte – UNINORTE	mariluce@uninorte.com.br	Mariluce Santiago de Souza	www.uninorte.com.br
Educational	AM	Centro de Educação Tecnológica do Amazonas – CETAM	gabinetecetam@cetam.am.gov.br	Laura Vicuña Velasquez	www.cetam.am.gov.br
Educational	AP	Serviço Nacional de Aprendizagem Industrial – SENAI/AP	atendimento@ap.senai.br	Antonio Carlos da Silva	www.ap.senai.br
Educational	AP	Instituto Federal de Educação, Ciência e Tecnologia do Amapá – IFAP	hilton.castro@ifap.edu.br	Hilton Prado de Castro Junior	www.ifap.edu.br
Educational	AP	Fundação Universidade Federal do Amapá – UNIFAP	andreleite@unifap.br	André da Costa Leite	www.unifap.br
Educational	BA	Secretaria da Fazenda do Estado da Bahia – SEFAZ/BA	coordenacaodeensinoadistancia@sefaz.ba.gov.br	Luciana Barone Leite	www.sefaz.ba.gov.br
Educational	BA	Universidade Estadual de Santa Cruz – UESC	reitoria@uesc.br	Maridalva de Souza Penteado	www.uesc.br
Educational	BA	Oliveira e Oliveira Empreendimentos Educacionais Ltda.	ead@fasete.edu.br	Marcos de Souza Dantas	www.fasete.edu.br
Educational	BA	Centro Territorial de Educação Profissional do Médio Rio das Contas – CETEP	cetep.medioriodecontas@educacao.ba.gov.br	Gilvanio Zifirino Neto	www.ceteponline@blogspot.com.br
Educational	BA	Universidade do Estado da Bahia – UNEB	uneb@listas.uneb.br	Joelma Cerqueira de Oliveira	www.uneb.br
Educational	BA	Escola Estadual de Saúde Pública Professor Francisco Peixoto de Magalhães Neto	eesp.ce@gmail.com	Miralva Ferraz Barreto	www.saude.ba.gov.br/eesp
Educational	BA	Escola Bahiana de Medicina e Saúde Pública	antoniocarlos@bahiana.edu.br	Antonio Carlos Costa	www.bahiana.edu.br
Educational	BA	Universidade Estadual do Sudoeste da Bahia – UESB	uesbvirtual@uesb.edu.br	Zenaide de Oliveira Ferraz Silva	www.uesb.br
Educational	BA	Instituto Federal de Educação, Ciência e Tecnologia Baiano – IFBAIANO	gabinete@ifbaiano.edu.br	Jacqueline Gomes	www.ifbaiano.edu.br/portal/sobre

Institution	State	Institution	Email	Contact name	Link
Educational	BA	Faculdade Ruy Barbosa – FRB	vpplan@devrybrasil.edu.br	Claudia Simões Pinto da Cunha Lima	www.frb.edu.br
Educational	BA	Tribunal Regional do Trabalho- 5ª Região – TRT5	ead.cdp@trt5.jus.br	Cristiana de Oliveira Sarmento	www.trt5.jus.br
Educational	BA	Faculdade de Tecnologia e Ciências – FTC	elins@ftc.edu.br	Jussara Santos Gonzaga	www.ftc.br
Educational	BA	Universidade Federal da Bahia – UFBA	gabinete@ufba.br	João Carlos Salles Pires da Silva	www.ufba.br
Educational	CE	Universidade de Fortaleza – UNIFOR	nead@unifor.br	Denise de Castro Gomes	www.unifor.br
Educational	CE	Centro Universitário Christus – Unichristus	nead@unichristus.edu.br	Marcos Ricarte	www.unichristus.edu.br
Educational	CE	Fundação Demócrito Rocha – FDR	uane@fdr.com.br	Ana Paula Costa Salmin	www.fdr.org.br
Educational	CE	Unieducar Inteligência Educacional – UNIEDUCAR	sac@unieducar.org.br	Juracy Soares	www.unieducar.org.br
Educational	CE	Serviço Nacional de Aprendizagem Industrial – SENAI/CE	centralderelacionamento@sfiec.org.br	Carla Sousa Braga	www.senai-ce.org.br
Educational	CE	Instituto Superior de Teologia Aplicada – INTA	adm@inta.edu.br	Anaclea de Araujo Bernardo	www.inta.edu.br/souinta
Educational	CE	Grupo Intra de Ensino e Pesquisa a Distância	contato@intra-ead.com.br	Ana Carolina Pereira	www.intra-ead.com.br
Educational	CE	Faculdade Ateneu – FATE	ead@fate.edu.br	Luciana Duarte	http://fate.edu.br
Educational	CE	Faculdade Nordeste – FANOR	hfonseca@fanor.edu.br	Marbênia Gonçalves Almeida Bastos	www.fanor.edu.br
Educational	CE	Universidade Estadual Vale do Acaraú – UVA	ead@uvanet.br	Maria José Araújo Souza	www.uvanet.br
Educational	CE	Instituto Federal de Educação, Ciência e Tecnologia do Ceará – IFCE	ead@ifce.edu.br	Márcio Damasceno	www.ifce.edu.br
Educational	CE	Universidade Federal do Ceará – UFC	ufcvirtual@virtual.ufc.br	Mauro Cavalcante Pequeno	www.virtual.ufc.br
Educational	DF	Serviço Nacional de Aprendizagem do Transporte – SENAT/DF	adriennecapdeville@sestsenat.org.br	Adrienne de Capdeville	www.sestsenat.org.br

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Educational	DF	Instituto Federal de Brasília – IFB	ifb@etfbsb.edu.br	Josué de Sousa Mendes	www.ifb.edu.br
Educational	DF	Universidade dos Correios	adrianamoreira@correios.com.br	Adriana Moreira Lourenço	www.correios.com.br
Educational	DF	Instituto Nacional do Seguro Social – INSS	marx.menezes@inss.gov.br	Marx Menezes	http://escolavirtual.inss.gov.br
Educational	DF	Colégio Kadima	kadyma.educacional@gmail.com	Eliseu Kadesh	www.colegiokadima.com
Educational	DF	Rede Nacional de Educação a Distância em Segurança Pública – Rede EAD-SENASP	ead.senasp@mj.gov.br	Armando Slompo Filho	ead.senasp.gov.br
Educational	DF	Serviço Nacional de Aprendizagem Rural – SENAR/DF	comunicacao@senar.org.br	Marina Vianna	www.senar.org.br
Educational	DF	Serviço Nacional de Aprendizagem Industrial – SENAI/DF	milla.ribeiro@sistemafibra.org.br	Milla Michelle Couto Ribeiro	www.sistemafibra.org.br
Educational	DF	Serviço Brasileiro de Apoio às Micro e Pequenas Empresas – SEBRAE/DF	elias.santos@sebrae.com.br	Elias Alexandre Oliveira dos Santos	www.sebrae.com.br
Educational	DF	Escola de Administração Fazendária – ESAF	ead@fazenda.gov.br	Marina Fontes Borges	www.esaf.fazenda.gov.br
Educational	DF	Fundação Verde Herbert Daniel – FVHD	contato@fvhd.org.br	Vânia Carla Moraes Almeida	www.fvhd.org.br
Educational	DF	Instituto Legislativo Brasileiro do Senado Federal – ILB	ilbead@senado.leg.br	Simone Figueira Dourado	saberes.senado.leg.br
Educational	DF	Federação Nacional das AABBS – FENABB	fenabb@fenabb.org.br	Arthur Colaço Pires de Andrade	www.fenabb.org.br
Educational	DF	Federação Nacional das Apaes – APAE	secretariauniapae@apaebrasil.org.br	Aline Lamara	www.apaebrasil.org.br
Educational	DF	Centro de Educação de Jovens e Adultos a Distância do Distrito Federal – CESAS	coord.eadcesas@se.df.gov.br	Indira Vanessa Pereira Rehem	cesas.se.df.gov.br/ead
Educational	DF	Academia Nacional de Polícia Ministério da Justiça – DPF	secaed@dpf.gov.br	Murilo Luiz Cardoso	https://ead.dpf.gov.br

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Educational	DF	Centrais Elétricas do Norte do Brasil – Eletronorte	ec.ead@eletronorte.gov.br	Sueli Garcia de França	www.eletronorte.gov.br
Educational	ES	Faculdade Unida de Vitória	giovanni@faculdadeunida.com.br	Giovanni Livio	www.faculdadeunida.com.br
Educational	ES	Universidade Vila Velha – UVV	nead@uvv.br	Ester Maria Klippel	www.uvv.br
Educational	ES	Faculdade Novo Milênio	administrapolo@novomilenio.br	Antonia Verone do Nascimento Rufino	www.novomilenio.br
Educational	ES	Fundação de Assistência e Educação – FAESA	ead@faesa.br	Ligia Rubim	www.faesa.br
Educational	ES	Associação Educacional Cultural e Assistencial – MIESPERANZA	miesperanza@miesperanza.org.br	Dr. Zilmar Ferreira Freitas	www.miesperanza.org.br
Educational	ES	Instituto Federal do Espírito Santo – IFES	ensino.cefor@ifes.edu.br	Maria Auxiliadora Vilela Paiva	www.ifes.edu.br
Educational	GO	Tribunal de Justiça do Estado de Goiás	dmysmar@hotmail.com	Dayse Mysmar Tavares Rodrigues	www.tjgo.jus.br
Educational	GO	Escola Municipal de Saúde Pública de Aparecida de Goiânia – EMSP	emsp.aparecidategoiania@gmail.com	Ana Valéria dos Santos Barroso	
Educational	GO	Pontifícia Universidade Católica de Goiás – PUC-GO	rosealmas@pucgoias.edu.br	Rose Mary Almas de Carvalho	www.pucgoias.edu.br
Educational	GO	Serviço Nacional de Aprendizagem Industrial – SENAI/GO	cristiane.senai@sistemafieg.org.br	Cristiane dos Reis Brandão Neves	www.senaigo.com.br
Educational	GO	Serviço Social da Indústria – SESI/GO	niead@sistemafieg.org.br	Celso Pinto Soares Junior	www.sistemafieg.org.br/portalcliente/paginas/principal.jsf
Educational	GO	Serviço Nacional de Aprendizagem do Transporte – SENAT/GO	frego@sestsenat.org.br	Fernando R. R. de Paula	www.sestsenat.org.br
Educational	GO	Escola de Governo Henrique Santillo – SEGPLAN	escoladegoverno@segplan.go.gov.br	Cynthia Crhistyne Ribeiro Espinosa	www.segplan.go.gov.br

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Educational	GO	Instituto Federal Goiano – IFGOIANO	ead@ifgoiano.edu.br	Daniela Costa Custódio	www.ead.ifgoiano.edu.br
Educational	GO	Escola Superior da Magistratura do Estado de Goiás – ESMEG	ead@esmeg.org.br	Simone Domingues do Carmo Costa	http://ead.esmeg.org.br
Educational	GO	Instituto de Pós Graduação – IPOG	ipog@ipog.edu.br	Ariana Ramos Massensini	www.ipog.edu.br
Educational	MA	Universidade Estadual do Maranhão – UEMA	ilka.serra@uema.br	Giselle Magalhães Pinto de Melo Ramos	www.uema.br
Educational	MA	Associação de Ensino Superior – CEUMA	ceuma@elo.com.br	Alda Leila Santos Baldez	www.ceuma.br
Educational	MG	Pontifícia Universidade Católica de Minas Gerais – PUC/MG	ead.diretoria@pucminas.br	Marcos André Silveira Kutova	www.pucminas.br
Educational	MG	Faculdades Associadas de Uberaba – FAZU	renata.serafim@fazu.br	Renata Soares Serafim	www.fazu.br
Educational	MG	Universidade Federal de Viçosa – UFV	silvane@ufv.br	Silvane Guimarães Silva Gomes	https://www2.cead.ufv.br/cead/scripts/inicio.php
Educational	MG	Universidade Federal dos Vales do Jequitinhonha e Mucuri – UFVJM	reitoria@ufvjm.edu.br	Everton Luiz de Paula	www.ufvjm.edu.br
Educational	MG	Martins Comércio	martins@martins.com.br	Artur Tavares	www.martinsdistribuidor.com.br
Educational	MG	Centro Universitário de Patos de Minas – UNIPAM	coordenacaoead@unipam.edu.br	Flávio Daniel Borges de Moraes	www.unipam.edu.br
Educational	MG	Faculdade de Minas – FAMINAS BH	diretoriaacademica@faminasbh.edu.br	Ana Carolina Pinto da Silva	http://faminas.edu.br
Educational	MG	Instituto Federal Sul de Minas Gerais – Campus Muzambinho – IFSULDEMINAS	luiz@muz.ifsuldeminas.edu.br	Luiz Carlos Machado Rodrigues	www.muz.ifsuldeminas.edu.br
Educational	MG	Instituto Federal do Triângulo Mineiro – Campus Avançado Uberaba Parque Tecnológico – IFTM	dg.av.upt@iftm.edu.br	José Ricardo Gonçalves Manzan	www.iftm.edu.br/uraparquetecnologico
Educational	MG	Serviço Social da Indústria – SESI/MG	adleme@fiemg.com.br	Adriana Duarte Paes Leme	www.fiemg.com.br

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Educational	MG	Number One Recife Educar Mais	recepcao@numberone.com.br	Daniela Soares	www.numberone.com.br
Educational	MG	Espaço Psicopedagógico BH Educação a Distância	psicopedagogicobh@gmail.com	Everardo José Magalhães	espaco psicopedagogicobh.moodlelivre.com
Educational	MG	Universidade Federal de Juíz de Fora – UFJF	liamara@ice.ufjf.br	Liamara Scortegagna	www.ufjf.br
Educational	MG	Centro Universitário do Sul de Minas – UNIS	comunicacao@unis.edu.br	Simone Teodoro Moreira	www.unis.edu.br
Educational	MG	Universidade Federal de Lavras – UFLA	reitoria@reitoria.ufla.br	Warley Ferreira Sahn	www.ufla.br
Educational	MG	Instituto Federal Sudeste de Minas – Campus Barbacena – IFSUDESTEMG	cgcsead.barbacena@ifsudestemg.edu.br	Adriano José Boratto	www.barbacena.ifsudestemg.edu.br
Educational	MG	Centro Universitário Newton Paiva	faleconosco@newtonpaiva.br	Raquel Mendes Pinto Chequer	www.newtonpaiva.br
Educational	MG	Universidade Federal de São João del Rei – UFSJ	coape@nead.ufsj.edu.br	Marise Maria Santana da Rocha	www.nead.ufsj.edu.br
Educational	MG	Universidade Federal de Minas Gerais – UFMG	ead@ufmg.br	Wagner José Corradi Barbosa	www.ead.ufmg.br
Educational	MG	Fundação Educacional Lucas Machado – FELUMA	nucleopedagogico@feluma.org.br	Nathalia Bernardes Fortes	www.cmmg.edu.br
Educational	MG	Fundação Unimed	ead@fundacaounimed.org.br	Juliana Nogueira Machado	www.fundacaounimed.org.br
Educational	MG	AMX Online	amxonline@amxgrupo.com.br	Alexandre Melo	www.amxonline.com.br
Educational	MG	Univercemig	univercemig@cemig.com.br	Leonardo Locarno	www.cemig.com.br/pt-br/recursos_humanos/univercemig/paginas/univercemig.aspx
Educational	MG	Instituto de Saúde Física e Mental	mjm@pontoequilibrio.com.br	Maria José Marinho	www.pontoequilibrio.com.br
Educational	MG	Universidade Estadual de Montes Claros – UNIMONTES	reitoria@unimontes.br	Maria Ângela Lopes Dumont Macêdo	www.unimontes.br
Educational	MG	A.S. Sistemas Software Ltda.	adelson.canudo@aulasadistancia.com.br	Adelson Marques Canudo	www.aulasadistancia.com.br

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Educational	MG	Universidade Federal de Uberlândia – UFU	cead@cead.ufu.br	Sarah Mendonça de Araújo	www.cead.ufu.br
Educational	MG	Inspire Gestão Cultural	contato@inspirebr.com.br	Maria Helena Cunha	www.inspirebr.com.br
Educational	MG	Universidade de Uberaba – UNIUBE	uniube@uniube.br	Janete Aparecida Pereira Melo	www.uniube.br
Educational	MG	Universidade Federal de Itajubá – UNIFEI	luciana.ead@unifei.edu.br	Luciana Fátima de Araujo Gonçalves Ferreira	www.unifei.edu.br
Educational	MS	Centro Universitário da Grande Dourados – UNIGRAN	sec.reitoria@unigran.br	Marcelo Ioris Kochê	www.unigran.br
Educational	MS	Universidade Federal da Grande Dourados – UFGD	direcaoeadufgd@ufgd.edu.br	Elizabeth Matos Rocha	portalead.ufgd.edu.br
Educational	MS	Instituto Federal de Educação de Mato Grosso do Sul – IFMS	coead@ifms.edu.br	Flávia Regina Grego	www.ifms.edu.br
Educational	MS	Escola Padrão	iuri@escolapadiao.com.br	Iuri Bueno	www.escolapadiao.com.br
Educational	MS	Universidade Anhanguera – UNIDERP	ddi@kroton.com.br	Isabella Fernandes de Oliveira	www.ead.uniderp.br
Educational	MT	Instituto de Educação Vanguarda	veneranda.quezada@gmail.com	Janaina Ferreira	www.institutovanguarda.com.br
Educational	MT	Universidade Federal de Mato Grosso – UFMT	cemtic@ufmt.br	Taciana Mirna Sambrano	www.ufmt.br
Educational	PA	Escola de Administração Tributária da Secretaria de Estado da Fazenda do Paraná – ESAT	esatdigital@sefa.pr.gov.br	Mário Sérgio da Silva Brito	www.esat.fazenda.pr.gov.br
Educational	PA	Serviço Nacional de Aprendizagem Industrial – SENAI/PA	ead@senaipa.org.br	Davis Siqueira	www.senaipa.org.br
Educational	PA	Cidade Aprendizagem	diretor@cidadeaprendizagem.com.br	Ezelildo G. Dornelas	www.cidadeaprendizagem.com.br
Educational	PA	CDC Educação	cdc@cdceducacao.com.br	Neyza Ester	www.cdceducacao.com.br

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Educational	PA	Universidade do Estado do Pará – UEPA	gabinete@uepa.br	Ruth Souza da Costa	www.uepa.br
Educational	PB	Universidade Estadual da Paraíba – UEPB	proead@uepb.edu.br	Eliane de Moura Silva	http://proeitorias.uepb.edu.br/proead
Educational	PB	Escola Judiciária do Tribunal Regional Eleitoral da Paraíba – TRE/PB	ejejb@tre-pb.jus.br	Elci Ubarana Junior	www.tre-pb.jus.br/institucional/escola-judiciaria-eleitoral
Educational	PB	União de Ensino e Pesquisa Integrada – UNEPI	cassio@unepi.com.br	Cassio Cabral Santos	www.unepi.com.br
Educational	PB	Serviço Nacional de Aprendizagem Industrial – SENAI/PB	wendellross@fiepb.org.br	Joanna Marques	www.fiepb.com.br
Educational	PB	Instituto Federal da Paraíba – IFPB	ead@ifpb.edu.br	Anderson Braulio Nobrega da Silva	www.ead.ifpb.edu.br
Educational	PE	Universidade de Pernambuco – UPE	rmoraes.upe@gmail.com	Vitoria Ribas	www.upe.br
Educational	PE	Serviço Social da Indústria – SESI/SP	claudineia.costa@pe.sesi.org.br	Maria Claudinéia Gomes da Costa	www.pe.sesi.org.br
Educational	PE	Universidade Federal do Vale do São Francisco – UNIVASF	sead@univasf.edu.br	Mirele Rodrigues Feitosa	www.sead.univasf.edu.br
Educational	PE	Fundação Joaquim Nabuco – FUNDAJ	ead.difor@fundaj.gov.br	Verônica Danieli de Lima Araújo	www.fundaj.gov.br
Educational	PE	Secretaria de Educação de Pernambuco – SEEP	gabinete.seep@gmail.com	George Bento Catunda	www.educacao.pe.gov.br
Educational	PE	Instituto Federal de Educação, Ciência e Tecnologia de Pernambuco – IFPE	direcaogeral@ead.ifpe.edu.br	Rosa Maria Oliveira Teixeira de Vasconcelos	www.ifpe.edu.br
Educational	PE	Colégio Agrícola Dom Agostinho Ikas – CODAI-UFRPE	argelianead@hotmail.com	Argelia Maria Araujo Dias Silva	www.ufrpe.br/br
Educational	PE	Universidade Católica de Pernambuco – UNICAP	assecom@unicap.br	Valter Luís de Avellar	www.unicap.br
Educational	PE	Centro Universitário do Vale do Ipojuca – UNIFAVIP	unifavip@unifavip.edu.br	Pedro Ivo de Oliveira Rodrigues	www.unifavip.edu.br

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Educational	PE	Faculdade Boa Viagem S.A. – FBV	fbv@fbv.edu.br	Ricardo Alexandre de Oliveira Ciriaco	www.fbv.edu.br
Educational	PE	Universidade Federal Rural de Pernambuco – UFRPE	diretor.geral.ead@ufrpe.br	Juliana Regueira Basto Diniz	www.ead.ufrpe.br
Educational	PE	Universidade Federal de Pernambuco – UFPE	gabinete@ufpe.br	Patricia Smith Cavalcante	www.ufpe.br
Educational	PI	Universidade Federal do Piauí – UFPI	comunicacao@ufpi.edu.br	Gildásio Guedes Fernandes	www.ufpi.br
Educational	PI	Serviço Nacional de Aprendizagem do Transporte – SENAT/PI	teresina.pi@sestsenat.org.br	José Anchieta dos Santos Filho	www.ead.sestsenat.org.br
Educational	PR	Corpo de Bombeiros do Paraná	ccb-bm3@pm.pr.gov.br	Samuel Prestes	www.bombeiros.pr.gov.br
Educational	PR	Universidade Federal da Integração Latino Americana – UNILA	unila@unila.edu.br	Jorgelina Ivana Tallei	www.unila.edu.br
Educational	PR	Centro Universitário – FAE	vera.dullius@fae.edu	Vera Fatima Dullius	www.fae.edu
Educational	PR	Universidade Paranaense – UNIPAR	coord-ead@unipar.br	Ana Cristina de Oliveira Cirino Codato	www.unipar.br
Educational	PR	Universidade Estadual de Ponta Grossa – UEPG	nutead@nutead.org	Eliane de Fátima Rauski	www.nutead.org
Educational	PR	Sociedade Educacional Tuiuti – UTP	cead@utp.br	Marlei Gomes da Silva Malinoski	www.utp.edu.br
Educational	PR	Instituto Brasileiro de Desenho Instrucional – IBDIN	contato@ibdin.com.br	Sílvia Mara dos Santos	www.ibdin.com.br
Educational	PR	Cebrac Consultoria e Franquia – CEBRAC	nancy.ferreira@cebrac.com.br	Nancy Sípoli Sert Ferreira	www.cebrac.com.br
Educational	PR	Faculdade Instituto Superior de Educação do Paraná – FAINSEP	fainsep@fainsep.edu.br	Argemiro Aluísio Karling	www.fainsep.edu.br
Educational	PR	Faculdades Batista do Paraná – FTBP	ftbp@ftbp.com.br	Robson Maurício Ghedini	www.ftbp.com.br
Educational	PR	Universidade Estadual do Norte do Paraná – UENP	ead@uenp.edu.br	Silvio Tadeu de Oliveira	www.uenp.edu.br

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Educational	PR	Faculdade de Educação Superior do Paraná – FESP	coordenacaonead@fesppr.br	Luciene Ferreira Iahn	www.fesppr.br
Educational	PR	Centro de Educação Profissional Nahyr Kalckmann de Arruda – CEPNKA	pedagoga@facop.org.br	Maria Letizia Marchese	www.facop.org.br
Educational	PR	Centro Universitário Dinâmica das Cataratas – UDC	alessandra@anglofoz.com.br	Alessandra Bussador	www.ead.udc.br
Educational	PR	Centro Universitário Filadélfia – UNIFIL	reitor@unifil.br	Leandro Henrique Magalhães	www.unifil.br
Educational	PR	Universidade Tecnológica Federal do Paraná – UTFPR	coted-ct@utfpr.edu.br	Iolanda Bueno de Camargo Cortelazzo	www.utfpr.edu.br/curitiba/estrutura-universitaria/diretorias/dirgrad/coted
Educational	PR	Centro Universitário Internacional – UNINTER	benhur.g@uninter.com	Karin Sell Schneider Lima	www.uninter.com
Educational	PR	Faculdades OPET	normasanson@opet.com.br	Norma Suely dos Santos Sanson	www.opet.com.br
Educational	PR	Faculdade Educacional da Lapa – FAEL	secretariageral@fael.edu.br	Miriele Kukla	www.fael.edu.br
Educational	PR	Serviço Nacional de Aprendizagem Industrial – SENAI/PR	eadsenaipr@pr.senai.br	Adriana Mattei	www.senaipr.org.br
Educational	PR	Faculdade Adventista Paranaense – IAP	nead@iap.org.br	Dirce Huf Ferraz	www.iap.org.br
Educational	PR	Universidade Positivo – UP	manoela.tagliaferro@universidadepositivo.com.br	Manoela Pieirina Tagliaferro	www.up.edu.br
Educational	PR	Centro Universitário de Maringá – UNICESUMAR	reitor@unicesumar.edu.br	Fabricio Lazilha	www.unicesumar.edu.br
Educational	PR	Universidade Norte do Paraná – UNOPAR	ddi@kroton.com.br	Isabella Fernandes de Oliveira	www.unopar.br
Educational	PR	D' Music House	dmusichouse@dmusichouse.com.br	Clóvis Martini de Barros	www.dmusichouse.com.br
Educational	PR	Dom Bosco Ensino Superior	edelclaytonribeiro@dombosco.sebsa.com.br	Edelclayton Ribeiro	www.domboscoead.com.br
Educational	RJ	Livre Docência Tecnologia Educacional	regis@livredocencia.com.br	Régis Tractenberg	www.livredocencia.com.br

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Educational	RJ	Escola de Servidores do TRT – RJ	esacs@trt1.jus.br	Elizabeth Faustino da Silva	www.trt1.jus.br
Educational	RJ	Escola Virtual da Polícia Militar do Estado do Rio de Janeiro	escolavirtual_cqps@pmerj.rj.gov.br	Carlos Eduardo Oliveira da Costa	ev.pmerj.rj.gov.br
Educational	RJ	Instituto Federal Fluminense – IFF	cead@iff.edu.br	Rayanna Maciel Gomes	http://portal1.iff.edu.br/ead
Educational	RJ	Fundação Comitê de Gestão Empresarial Fundação Coge – FUNCOGE	jcborges@funcoge.org.br	João Carlos Borges Moreira	www.funcoge.org.br
Educational	RJ	Serviço Social do Comércio – SESC Nacional	aalbuquerque@sesc.com.br	Aline Vieira de Albuquerque	www.sesc.com.br
Educational	RJ	Fundação Educacional Unificada Campograndense – FEUC	superintendencia@feuc.br	Vladimir Leite Gonçalves	www.feuc.br/
Educational	RJ	Centro Federal de Educação Tecnológica Celso Suckow da Fonseca – CEFET/RJ	direg@cefet-rj.br	Maria Esther Provenzano	www.cefet-rj.br
Educational	RJ	Comissão de Valores Mobiliários – CVM	coe@cvm.gov.br	Débora Gonçalves de Souza	www.cvm.gov.br
Educational	RJ	Globo Comunicação e Participação S/A	uniglobo@tvglobocom.br	Wagner da Costa Jesuino	
Educational	RJ	Sociedade Unificada de Ensino Augusto Motta – UNISUAM	nlemos@unisum.edu.br	Nivea Cristina Vieira Lemos	www.unisum.edu.br
Educational	RJ	Escola Superior de Guerra – ESG	ead@esg.br	Fabio Perdonati da Silva	www.esg.br/index.php/br
Educational	RJ	Universidade Estácio de Sá – UNESA	relacionamento.ead@estacio.br	Roberta Martins Ramos	www.estacio.br
Educational	RJ	Faculdades São José	assessoria@saojose.br	Rita de Cássia Borges de Magalhães Amaral	www.saojose.br
Educational	RJ	Diretoria de Ensino da Marinha	biagiotti@densm.mar.mil.br	Luiz Claudio Medeiros Biagiotti	www.densm.mar.mil.br
Educational	RJ	Universidade Salgado de Oliveira	gestor.academico@ead.universo.edu.br	Diogo Pereira da Silva	online.universo.edu.br

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Educational	RJ	Escola Técnica Cristo Redentor – ETCR	info@etcr.com.br	Carlos Milioli	www.etcr.com.br
Educational	RJ	Departamento de Educação e Cultura do Exército – DECEX	heidertsantana@gmail.com	Heider Teixeira de Santana	www.dececx.ensino.eb.br
Educational	RJ	Escola de Administração Judiciária do Tribunal de Justiça do Estado do Rio de Janeiro – TJRJ	pingitore@tjrj.jus.br	Angela Cardoso Pingitore	www.tjrj.jus.br/web/guest/escola-da-administracao-judiciaria
Educational	RJ	Universidade Estadual do Norte Fluminense Darcy Ribeiro – UENF	reitoria@uenf.br	Marina Satika Suzuki	www.uenf.br
Educational	RJ	Instituto Brasileiro de Administração Municipal – IBAM	ibam@ibam.org.br	Márcia Costa Alves da Silva	www.ibam.org.br
Educational	RJ	Serviço Nacional de Aprendizagem Comercial – SENAC Departamento Nacional	desenvolvimento.educacional@senac.br	Edwin Giebelen	www.ead.senac.br
Educational	RJ	Centro Municipal de Referência de Educação de Jovens e Adultos – CREJA	creja@rioeduca.net	Fatima Luzia Soares Valente	www.creja.blogspot.com.br
Educational	RJ	Secretaria Municipal de Educação de Duque de Caxias	p2.keitemelo@smeduquedecaxias.rj.gov.br	Keite Silva de Melo	www.smeduquedecaxias.rj.gov.br/portal
Educational	RJ	Escola Brasileira de Administração Pública e de Empresas – EBAPE/ FGV	bernardo.fajardo@fgv.br	Ricardo de Oliveira Razuk	www.ebape.fgv.br/programas/graduacao-tecnologica-ead/apresentacao
Educational	RJ	Serviço Nacional de Aprendizagem Comercial – SENAC/RJ	sac@rj.senac.br	Sandra Dias	www.rj.senac.br
Educational	RJ	Instituto Federal de Educação, Ciência e Tecnologia do Rio de Janeiro – IFRJ	nead.canp@ifrj.edu.br	Aline Pinto Amorim	www.ifrj.edu.br
Educational	RJ	Fundação Centro de Ciências e Educação Superior a Distância do Estado do Rio de Janeiro – CEDERJ	faleconosco@cederj.rj.gov.br	Carlos Eduardo Bielschowsky	www.cederj.edu.br
Educational	RJ	Ibmec Online	coordenacao@ibmec.edu.br	Juliana Tenorio	www.ibmeconline.com.br

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Educational	RN	Centro Avançado de Ensino – CADERN	contato@cadern.com.br	Jean Claude de Araujo	www.cadern.com.br
Educational	RN	Universidade Federal do Rio Grande do Norte – UFRN	sedis@sedis.ufrn.br	Secretaria de Educação a Distância	www.ufrn.br
Educational	RO	Universidade Federal de Rondônia – UNIR	reitoria@unir.br	Neffretier Cinthya Rebello André dos Santos Clasta	www.unir.br
Educational	RS	Centro Universitário Ritter dos Reis – UNIRITTER	ead@uniritter.edu.br	Clarissa Tarragô Candotti	www.uniritter.edu.br
Educational	RS	Centro Universitário – UNIVATES	atendimento@univates.br	Alexandre Stürmer Wolf	www.univates.br
Educational	RS	Universidade Católica de Pelotas – UCPEL	ead@ucpel.edu.br	Gabriela Jurak de Castro	www.ucpel.edu.br
Educational	RS	Faculdade da Serra Gaúcha – FSG	fsg@fsg.br	André Antonio Gomes da Silva	www.fsg.br
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Educational	RS	Fundação Universidade de Caxias do Sul – UCS	eaducs@ucs.br	Claudia Mara Sganzerla	www.ucs.br
Educational	RS	Centro Universitário Metodista – IPA	coordenadoria.avaliacao@metodistadosul.edu.br	Franciele Fontana	www.ipametodista.edu.br
Educational	RS	Universidade do Vale do Rio dos Sinos – UNISINOS	pweber@unisinos.br	Patricia Weber	www.unisinos.br
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Educational	RS	Universidade Federal de Santa Maria – UFSM	prcolusso@gmail.com	Paulo Roberto Colusso	www.ufsm.br
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Educational	SC	Centro de Estudos Pré-Universitário – CEPU	ana@cepunet.com.br	Ana Maria Machado	www.cephu.com.br
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Educational	SC	Departamento de Polícia Rodoviária Federal Ministério da Justiça – PRF	oliveira.ana@prf.gov.br	Ana Paula Pereira Oliveira	www.prf.gov.br
Educational	SC	Instituto Brasileiro Design de Interiores – IBDI-EDU	secretaria@ibdi-edu.com.br	Luana Karini Neumann	www.ibdi-edu.com.br
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Educational	SC	Universidade Comunitária da Região de Chapecó – UNOCHAPECO	unovirtual@unochapeco.edu.br	Marcela do Prado	www.unochapeco.edu.br
Educational	SC	Universidade do Contestado – UNC	reitoria@unc.br	Eduardo Dominico	www.unc.br
Educational	SC	Serviço Nacional de Aprendizagem do Transporte – SENAT/SC	sdurieux@sestsenat.org.br	Shirley Mary Durieux	www.sestsenat.org.br
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Educational	SC	Sociedade Educacional de Santa Catarina – SOCIESC	academico.ead@sociesc.org.br	Kátia Cristina Reimer Siedschlag	www.unisociesc.org.br
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Educational	SP	CEEJA Votorantim	e980213a@educacao.sp.gov. br	Marta Aparecida Rodrigues Vallandro	ceejavotorantim. webenode.com
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Educational	SP	Centro Paula Souza – CEETEPS	adelina.lucio@cps.sp.gov.br	Adelina Maria Lucio	www.centropaulasouza. sp.gov.br
Educational	SP	Chriare Soluções Inteligentes e Gestão de Pessoas	chriaresolucoes@gmail.com	Roberta Rossi Oliveira Palermo	www.chriaresolucoes. com.br
Educational	SP	Universidade Paulista – UNIP	elisete.tutoria@unip.br	Elisete Aparecida Rasera	www.unipinterativa. edu.br
Educational	SP	Escola de Aviação Congonhas – EACON	eacon.ead@gmail.com	Sandra Fabiola Estigarribia S. Bertulucci	www.eacon.com.br
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Educational	SP	Faculdade Método de São Paulo – FAMESP	andre.siqueira@famesp.com. br	Andre Siqueira	www.famesp.edu.br

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Educational	SP	Centro Universitário Hermínio Ometto – UNIARARAS	proreitoria@uniararas.br	Marcelo Augusto Marretto Esquisatto	www.uniararas.br
Educational	SP	Colégio Lapa	colegiolapa@colegiolapa.com.br	José Gonçalves Lage e Silva	www.colegiolapa.com.br
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Educational	SP	Instituto Universal Brasileiro	riobranco@institutouniversal.com.br	Irene Rodrigues de Oliveira Teixeira Ribeiro	www.institutouniversal.com.br
Educational	SP	Omrá Consultoria em Negócios e Produtividade Pessoal	info.site@omra.com.br	Wagner Mancini	www.omra.com.br
Educational	SP	Faculdade Santa Marcelina	lucia.sanchez@santamarcelina.edu.br	Lúcia Sanchez	www.fasm.edu.br
Educational	SP	Serviço Social do Comércio – SESC/SP	werley@sescsp.org.br	Werley Carlos de Oliveira	www.sescsp.org.br
Educational	SP	Faculdade de Saúde Pública da USP	cesp@usp.br	Paulo Capel Narvai	www.fsp.usp.br/site/paginas/mostrar/5349
Educational	SP	Universidade São Francisco – USF	simone.spiandorello@usf.edu.br	Simone Cristina Spiandorello	www.usf.edu.br
Educational	SP	Instituto Singularidades	katia@singularidades.com.br	Katia Ramos	www.singularidades.com.br
Educational	SP	Blossom Educação em Terapia Floral	contato@blossomedu.com.br	Marcelle Machado	www.blossomedu.com.br
Educational	SP	Centro de Integração Empresa Escola – CIEE	ead@ciee.org.br	Rosa Maria Simone	www.ciee.org.br
Educational	SP	Fortec Assessoria e Treinamento – FORTEC	fatef@fortec.edu.br	Silvia Maria Troncoso	www.fortec.edu.br
Educational	SP	Centro Universitário Toledo Prudente	toledo@toledoprudente.edu.br	Eli Candido Junior	www.toledoprudente.edu.br
Educational	SP	Centro Universitário Adventista de São Paulo – UNASP	delton.unglaub@unasp.edu.br	Delton Lehr Unglaub	www.ead.unasp.edu.br
Educational	SP	ABBC Educacional	atendimento@abbc.org.br	Viviane Mendes Machado	www.abbc.org.br/cursos
Educational	SP	Instituto Federal de Educação, Ciência e Tecnologia de São Paulo – IFSP	ded@ifsp.edu.br	Paulo José Evaristo da Silva	www.ifsp.edu.br

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Educational	SP	Sociedade de Ensino Regional Ltda. – COLÉGIO SOER	secretariageral@colegiosoer.com.br	Maria das Graças Rodrigues de Paula	www.colegiosoer.com.br
Educational	SP	Pontifícia Universidade Católica de Campinas – PUC-CAMPINAS	dde@puc-campinas.edu.br	Nelson de Carvalho Mendes	www.puc-campinas.edu.br
Educational	SP	Faculdade de Filosofia, Ciências e Letras de Ituverava – FFCL	toca@feituverava.com.br	Pamella Scapim Lemes Stuck	www.ffcl.com.br
Educational	SP	Fundação Universidade Federal de São Carlos – UFSCAR	sead@ufscar.br	Aline Maria de Medeiros Rodrigues Reali / Daniel Mill	www.ufscar.br
Educational	SP	Associação Leão XIII	iead@rccbrasil.org.br	Marcia Dalva Machinski	www.ieadrccbrasil.com.br
Educational	SP	Instituto de Logística da Aeronáutica – ILA	ead@ila.aer.mil.br	Cleber Aparecido Moriano	https://ilavirtual.aer.mil.br
Educational	SP	Universidade de Taubaté – UNITAU	rosanagiovanni.pires@gmail.com	Rosana Giovanni Pires	www.unitau.br
Educational	SP	Centro Educacional Paulo Nathanael – CEPN	secretaria@cepn.com.br	Karla Pires Almeida	www.cepn.com.br
Educational	SP	Faculdade Metrocamp	secretaria_campinas@metrocamp.edu.br	Carla Gonçalves Pelissoni	www.metrocamp.com.br
Educational	SP	Universidade do Oeste Paulista – UNOESTE	ead@unoeste.br	Marcelo Vinicius Creres Rosa	www.unoeste.br/ead
Educational	SP	Centro Universitário – UNISEB	karina.bizerra@estacio.br	Rozangela Nogueira de Moraes	www.uniseb.com.br
Educational	SP	Instituto Educar EPP IEDI	educar@eadeducar.com.br	Eduardo Penterich	www.eadeducar.com.br
Educational	SP	Companhia do Metropolitano de São Paulo – METRÔ	ouvidoria@metrosp.com.br	Flávio dos Santos Sapucaia	www.metro.sp.gov.br
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Educational	SP	Organização Barão de Mauá	ead@baraodemaua.br	Dyjalma Antonio Bassoli	www.baraoead.com.br
Educational	SP	Artesanato Educacional	artesanatoeducacional@gmail.com	João Mattar	www.artesanatoeducacional.com.br
Educational	SP	Centro Universitário Fieo – UNIFIEO	ead@unifio.br	Julia Kenski	www.unifio.br
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Educational	SP	Fundação Valeparaibana de Ensino – UNIVAP	univap@univap.br	Silene Fernandes Bicudo	www.univap.br/universidade.html
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Educational	SP	Damásio Educacional S/A	ead@damasio.edu.br	Camille Monteiro Viana Miguel	www.damasio.com.br
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Supplying	MG	Natanael Produções Vídeo	natanaelvideo@gmail.com	Natanael Salomão	www.tvprojetar.com.br
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Supplying	SC	FabriCo	contato@fabrico.com.br	Norton Moreira	www.fabrico.com.br
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Supplying	SC	Dot Digital Group	georgia.ribeiro@iea.com.br	Georgia Maria Ferro Benetti Ribeiro	www.dotgroup.com.br
Supplying	SC	Ilog Tecnologia Ltda.	contato@ilog.com.br	Gustavo de Oliveira Rohde	www.ilog.com.br
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Supplying	SP	Jair dos Santos Junior Consultoria Corporativa	contato@santosjunior.com.br	Jair dos Santos Junior	www.santosjunior.com.br
Supplying	SP	Centro Brasileiro do Conhecimento e Administração Educacional Ltda. - CBBON	cbcon@cbcon.com.br	Angelo Manoel Zanão	www.cbcon.com.br
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Supplying	SP	De Pieri Comunicação	falecom@depiericomunicacao.com.br	Sonia de Pieri	www.depiericomunicacao.com.br
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Annex II – Net data

Part 1 – Overview of the Brazilian Census for Distance Learning

Table 1.1 – Institutions participating in the Brazilian Census for Distance Learning in the past 4 years

	2012	2013	2014	2015
Total participants	251	282	271	368

Table 1.2 – Educational institutions participating in the Brazilian Census for Distance Learning in the past 4 years, by administrative category

Administrative category	2012	2013	2014	2015
Federal public educational institution	41	41	46	57
State public educational institution	18	24	17	29
Municipal public educational institution	1	3	4	6
For-profit private educational institution (school, training center, learning institute, etc.)	66	65	58	114
Non-profit educational institution (community, religious, philanthropic)	51	58	56	71
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	26	30	21	27
Non-governmental organization (NGO) and third sector	2	5	5	11
Government or public body	3	16	19	24
Other	14	11	13	
Total educational institutions	251	282	256	339

Table 1.3 – Supplying institutions participating in the Brazilian Census for Distance Learning in the past 2 years

	2014	2015
Supplying institutions	32	69

Table 1.4 – Supplying-educational institutions participating in the Brazilian Census for Distance Learning in the past 2 years

	2014	2015
Supplying-educational institutions	17	40

Part 2 – Profile of educational institutions participating in the 2015 Brazilian Census for Distance Learning

Table 2.1 – Educational institutions, by region

Region	No. of institutions	(%)
Central-West	46	13
Northeast	60	18
North	20	6
Southeast	143	42
South	71	21

Table 2.2 – States of origin of educational institutions

State	No. of institutions
SP	75
RJ	36
MG	32
PR	28
DF	24
RS	22
SC	20
BA	13
CE	12

(to be continued)

(continued)

State	No. of institutions
PE	12
GO	10
ES	6
MS	6
PB	6
PA	5
AC	4
RN	4
SE	4
AL	3
AM	3
AP	3
TO	3
MA	2
MT	2

(concluded)

State	No. of institutions
PI	2
RO	2
RR	1

Table 2.3 – Educational institutions headquartered in state capitals, DF or inland cities

Headquarters location	No. of institutions	(%)
State capitals or DF	216	64
Inland cities	121	36

Table 2.4 – Location of hubs – in state capitals, DF, inland cities, headquarters state and other states (average)

Administrative category	Hubs located in state capitals or Federal District (DF)		Hubs located in inland cities		Hubs in the same state as the headquarters		Hubs in other states	
	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)
Federal public educational institution	36	63.16	48	84.21	49	85.96	18	31.58
State public educational institution	11	36.67	18	60	18	60	1	3.33
Municipal public educational institution	1	16.67	1	16.67	2	33.33	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	43	37.39	37	32.17	50	43.48	26	22.61
Non-profit educational institution (community, religious, philanthropic)	27	38.03	35	49.3	39	54.93	19	26.76

(to be continued)

(concluded)

Administrative category	Hubs located in state capitals or Federal District (DF)		Hubs located in inland cities		Hubs in the same state as the headquarters		Hubs in other states	
	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	23	85.19	18	66.67	21	77.78	6	22.22
Non-governmental organization (NGO) and third sector	1	9.09	1	9.09	1	9.09	1	9.09
Government or public body	14	58.33	5	20.83	13	54.17	7	29.17

Table 2.5 – Years of operation of educational institutions in education in general and in distance learning

Years of operation	No. of institutions, by years of operation in the educational market	No. of institutions, by years of operation in distance learning
Less than 1 year	3	16
1-5 years	20	80
6-10 years	26	134
11-15 years	56	62
16-20 years	23	29
More than 20 years	209	17

Table 2.6 – Types of courses offered by institutions, by administrative category

Administrative category	Open corporate		Open non-corporate		Blended		Accredited full distance learning		On-site	
	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)
Federal public educational institution	6	10.53	17	29.82	23	40.35	32	56.14	51	89.47
State public educational institution	10	33.33	6	20	19	63.33	15	50	26	86.67
Municipal public educational institution	1	16.67	2	33.33	3	50	2	33.33	4	66.67

(to be continued)

Administrative category	Open corporate		Open non-corporate		Blended		Accredited full distance learning		On-site	
	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)
For-profit private educational institution	40	34.78	65	56.52	40	34.78	44	38.26	76	66.09
Non-profit private educational institution	10	14.08	27	38.03	30	42.25	34	47.89	65	91.55
"S System" institution	12	44.44	23	85.19	9	33.33	16	59.26	25	92.59
Non-governmental organization (NGO) and third sector	6	54.55	6	54.55	0	0	1	9.09	4	36.36
Government or public body	19	79.17	6	25	4	16.67	5	20.83	21	87.5

Table 2.7 – Public institutions that offer courses through the UAB

Administrative category	No. of institutions	(%)
Federal public educational institution	40	70.18
State public educational institution	16	53.33
Government or public body	2	8.33

Table 2.8 – Public institutions that offer courses through Unasus

Administrative category	No. of institutions	(%)
Federal public educational institution	10	17.54
State public educational institution	1	3.33

Table 2.9 – Educational institutions, by class profile

Classroom organization	No. of educational institutions
Up to 99 students	32
100-499 students	44
500-999 students	39
1.000-4.999 students	119
5.000-9.999 students	29
10.000-49.999 students	40
50.000-100.000 students	17
100.000-500.000 students	5
Unknown	13
Not informed	1

Table 2.10 – Offer of accredited full distance learning and blended courses, by academic level

Type of course	Primary education	Secondary education	Youth and adult primary education	Youth and adult secondary education	Technical vocational	Higher education: continuing – specific training	Higher education: continuing – complementary studies	Higher education: undergraduate – bachelor's degree	Higher education: undergraduate – teaching degree	Higher education: undergraduate – bachelor's and teaching degree	Higher education: undergraduate – technology	Higher education: graduate – <i>lato sensu</i> (specialization)	Higher education: graduate – <i>lato sensu</i> (MBA)	Higher education: graduate – <i>stricto sensu</i> (master's degree)	Higher education: graduate – <i>stricto sensu</i> (doctorate)
Full distance learning	20	19	17	28	184	43	221	148	258	139	241	1,079	197	7	0
Blended	21	3	254	278	158	26	18	474	177	189	206	294	50	19	3

(concluded)

Table 2.11 – Offer of accredited full distance learning and blended courses, by knowledge area

Knowledge area	Full distance learning	Blended
Applied Social Sciences	608	189
Humanities	253	1,389
Other	202	95
Business and Management	112	63
Exact and Earth Sciences	108	72
Military Studies	102	52
Linguistics, Literature and Arts	66	47
Engineering	46	65
Health Sciences	46	73
Information and Communication	23	22
Environment and Health	19	21
Security	18	14
Educational and Social Development	17	24
Biological Sciences	15	23
Industrial Processes and Control	14	11
Agricultural Sciences	8	4
Cultural production and design	6	5
Tourism, Hospitality and Leisure	5	9

(to be continued)

Knowledge area	Full distance learning	Blended
Natural Resources	4	5
Infrastructure	3	3
Food Production	2	1
Industrial Production	2	0

Table 2.12 – Offer of corporate and non-corporate open courses

Type of course	Non-corporate	Corporate
Professional initiation	3,659	1,196
Update course	1,557	504
Improvement training	1,014	289
University extension (courses)	956	38
Other	816	104
Operational training	782	858
Training in social/ behavioral skills	286	279
Languages	56	26
Preparation for standardized and admission tests etc.	18	6

Part 3 – Profile of students in distance learning institutions

Table 3.1 – Male and female audience in distance and on-site courses, by type of course and administrative category

Administrative category	Full distance learning (%)		Blended (%)		Open non-corporate (%)		Open corporate (%)		On-site (%)	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
Federal public educational institution	38.8	61.2	40.38	59.62	47.75	52.25	40	60	51.47	48.53
State public educational institution	40.43	59.57	39.56	60.44	34.4	65.6	39.8	60.2	39.44	60.56
Municipal public educational institution	44.5	55.5	50	50	25.5	74.5	–	–	37.5	62.5
For-profit private educational institution (school, training center, learning institute, etc.)	46.06	53.94	46.14	53.86	46.16	53.84	52.39	47.61	47.73	52.27
Non-profit educational institution (community, religious, philanthropic)	40.93	59.07	45.15	54.85	38.11	61.89	51.14	48.86	43.18	56.82
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	55.7	44.3	49.14	50.86	49.93	50.07	57.86	42.14	62	38
Non-governmental organization (NGO) and third sector	–	–	–	–	39.67	60.33	28.67	71.33	75	25
Government or public body	59.25	40.75	73.25	26.75	32.5	67.5	62	38	65.46	34.54

Table 3.2 – Age average of students in blended and distance courses, by type of course

	Less than 20 years old	21-30 years old	31-40 years old	More than 41 years old
Full distance learning	1	52	61	5
Blended	3	53	32	5
Open	0	42	51	3
Corporate	3	15	35	5
On-site	17	98	34	6

Table 3.3 – Institutions whose majority of students study and work, by type of course and administrative category

Administrative category (%)	Full distance learning (%)	Blended (%)	Open non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	65.63	65.22	23.53	33.33	7.84
State public educational institution	33.33	31.58	50	20	15.38
Municipal public educational institution	100	33.33	0	0	25

(to be continued)

(concluded)

Administrative category (%)	Full distance learning (%)	Blended (%)	Open non-corporate (%)	Corporate (%)	On-site (%)
Non-profit private educational institution	67.65	56.67	40.74	30	38.46
For-profit private educational institution	70.45	50	52.31	22.5	35.53
"S System" institution	31.25	55.56	30.43	8.33	16
Non-governmental organization (NGO) and third sector	100	0	66.67	66.67	25
Government or public body	40	25	16.67	5.26	23.81

(concluded)

Table 3.4 – Number of enrollments, by academic level

Type of course	Full distance learning	Blended
Primary education	4,381	1,57
Secondary education	5,515	130
Youth and adult primary education	21,327	15,829
Youth and adult secondary education	39,532	52,569
Technical vocational	43,841	80,092
Higher education: continuing – specific training	734	7,516
Higher education: continuing – complementary studies	68,971	3,282
Higher education: undergraduate – bachelor's degree	82,231	248,737
Higher education: undergraduate – teaching degree	148,222	187,687
Higher education: undergraduate – bachelor's and teaching degree	134,262	410,47
Higher education: undergraduate – technology	119,362	109,877
Higher education: graduate – <i>lato sensu</i> (specialization)	106,216	17,236
Higher education: graduate – <i>lato sensu</i> (MBA)	21,249	694

(to be continued)

Type of course	Full distance learning	Blended
Higher education: graduate – <i>stricto sensu</i> (master's degree)	214	293
Higher education: graduate – <i>stricto sensu</i> (doctorate)	0	0

Table 3.5 – Enrollments, by knowledge area and type of course

Knowledge area	Full distance learning	Blended
Applied Social Sciences	143,773	145,285
Humanities	113,001	31,449
Other	90,554	14,623
Exact and Earth Sciences	35,979	10,158
Business and Management	29,690	104,077
Linguistics, Literature and Arts	20,322	13,421
Engineering	17,789	7,308
Health Sciences	16,062	102,937
Educational and Social Development	5,654	106,552
Environment and Health	5,107	25,640
Information and Communication	4,547	15,239
Security	4,120	18,976

(to be continued)

(concluded)

Knowledge area	Full distance learning	Blended
Biological Sciences	3,677	4,243
Industrial Processes and Control	1,802	1,270
Natural Resources	1,676	4,732
Military Studies	1,550	1,045
Food Production	950	396
Agricultural Sciences	875	370
Infrastructure	804	355
Tourism, Hospitality and Leisure	533	984
Industrial Production	168	0
Cultural production and design	50	278

Table 3.6 – Enrollments in open corporate and non-corporate courses

Type of course	Open	Corporate
Professional initiation	1,880,165	137,092
Operational training	1,001,819	118,535
Improvement training	193,025	24,124
Other	153,516	4,234
Update course	147,684	82,464
University extension (courses)	57,527	10,082
Training in social/ behavioral skills	51,927	51,873
Languages	12,421	2,875
Preparation for standardized and admission tests etc.	7,498	4,030

Table 3.7 – Dropout, by type of course

Dropout rate	Full distance learning		Blended		Open		Corporate		On-site	
	Total	(%)	Total	(%)	Total	(%)	Total	(%)	Total	(%)
0%-5%	9	9	21	21.43	20	24.39	20	30.77	36	26.28
6%-10%	16	16	16	16.33	20	24.39	12	18.46	40	29.2
11%- 25%	28	28	37	37.76	15	18.29	15	23.08	48	35.04
26%- 50%	40	40	23	23.47	26	31.71	17	26.15	12	8.76
51%- 75%	7	7	1	1.02	1	1.22	0	0	1	0.73
76%- 100%	0	0	0	0	0	0	1	0	0	0

Table 3.8 – Dropout reasons, by type of course, in 1-4 Likert scale

Dropout reason	Corporate	Open	Blended	Full distance learning	On-site
Lack of time	2.84	2.67	2.6	2.72	2.33
Financial issues	1.27	1.71	2.42	2.55	2.66
Failure to adapt to the distance learning modality or course methodology	1.84	2.09	2.18	2.25	1.57
Bad choice of course	1.41	1.58	1.52	1.6	1.73

Table 3.9 – Agreement, in 1-4 Likert scale, with the statement that dropout rates are not applicable, as the student can come back any time

	Corporate	Open	Blended	Full distance learning	On-site
Not applicable (the student can come back any time)	1.67	1.84	2.01	2.13	1.79

Part 4 – Distance learning professionals

Table 4.1 – Distance learning professionals, by role

Role	Total
Tutoring	29,380
Teaching	18,769
Text content production	4,504
Audiovisual production	2,341
Pedagogical coordination	1,856
Other	1,822
Information technology (IT) support	1,458
Systems production or customization	1,172
Systems maintenance	1,109
Information technology (IT) training	579

Table 4.2 – Wages of tutors (by number of respondents – 2015)

Hourly wage	No. of institutions
R\$ 31-R\$ 45	71
R\$ 46-R\$ 55	12
R\$ 56-R\$ 65	15
R\$ 65-R\$ 75	6

Table 4.3 – Wages of teachers (by number of respondents – 2015)

Hourly wage	No. of institutions
R\$ 31-R\$ 45	68
R\$ 46-R\$ 55	28
R\$ 56-R\$ 65	21
R\$ 65-R\$ 75	14

Table 4.4 – Wages of coordinators (by number of respondents – 2015)

Hourly wage	No. of institutions
R\$ 31-R\$ 45	53
R\$ 46-R\$ 55	34
R\$ 56-R\$ 65	25
R\$ 65-R\$ 75	18

Table 4.5 – Wages of content producers (by number of respondents – 2015)

Hourly wage	No. of institutions
R\$ 31-R\$ 45	48
R\$ 46-R\$ 55	19
R\$ 56-R\$ 65	15
R\$ 65-R\$ 75	11

Table 4.6 – Type of production or acquisition of distance learning text content used by institutions, by type of course and administrative category

	Full distance learning (%)	Blended (%)	Open non-corporate (%)	Open corporate (%)	Blended (%)
Texts produced autonomously within the institution (without outsourcing production steps)					
Federal public educational institution	71.88	56.52	64.71	66.67	29.41
State public educational institution	60	42.11	83.33	60	34.62
Municipal public educational institution	50	100	100	100	50
For-profit private educational institution (school, training center, learning institute, etc.)	68.18	72.5	66.67	55	59.74
Non-profit educational institution (community, religious, philanthropic)	79.41	77.42	75	70	51.52
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	37.5	55.56	52.17	25	44
Non-governmental organization (NGO) and third sector	0	0	50	66.67	50
Government or public body	80	100	83.33	78.95	85.71
Texts produced within the institution (outsourcing production steps)					
Federal public educational institution	37.5	34.78	5.88	16.67	9.8
State public educational institution	46.67	21.05	0	30	7.69
Municipal public educational institution	0	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	36.36	25	22.73	12.5	12.99
Non-profit educational institution (community, religious, philanthropic)	35.29	9.68	32.14	30	18.18
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	37.5	22.22	21.74	50	20

(to be continued)

(continued)

	Full distance learning (%)	Blended (%)	Open non- corporate (%)	Open corporate (%)	Blended (%)
Non-governmental organization (NGO) and third sector	100	0	33.33	50	0
Government or public body	60	25	33.33	26.32	23.81
Texts produced by third parties (commissioned and supervised by the institution)					
Federal public educational institution	0	8.7	0	0	1.96
State public educational institution	13.33	5.26	0	10	7.69
Municipal public educational institution	0	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	25	12.5	9.09	10	6.49
Non-profit educational institution (community, religious, philanthropic)	14.71	6.45	14.29	10	6.06
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	18.75	44.44	17.39	33.33	16
Non-governmental organization (NGO) and third sector	0	0	16.67	50	25
Government or public body	40	25	16.67	10.53	23.81
Texts acquired from specialized suppliers					
Federal public educational institution	0	0	0	0	3.92
State public educational institution	6.67	0	0	0	3.85
Municipal public educational institution	0	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	15.91	10	10.61	5	6.49
Non-profit educational institution (community, religious, philanthropic)	2.94	6.45	17.86	10	9.09
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	0	11.11	8.7	8.33	12

	Full distance learning (%)	Blended (%)	Open non- corporate (%)	Open corporate (%)	Blended (%)
Non-governmental organization (NGO) and third sector	0	0	0	16.67	25
Government or public body	20	25	0	5.26	28.57
Free texts adapted within the institution					
Federal public educational institution	37.5	52.17	11.76	66.67	17.65
State public educational institution	53.33	31.58	50	20	19.23
Municipal public educational institution	0	33.33	0	0	25
For-profit private educational institution (school, training center, learning institute, etc.)	29.55	17.5	24.24	12.5	19.48
Non-profit educational institution (community, religious, philanthropic)	23.53	25.81	17.86	20	16.67
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	6.25	22.22	4.35	0	20
Non-governmental organization (NGO) and third sector	0	0	0	16.67	0
Government or public body	60	50	0	26.32	19.05
Free texts used as is					
Federal public educational institution	50	52.17	17.65	33.33	23.53
State public educational institution	53.33	57.89	66.67	20	34.62
Municipal public educational institution	0	33.33	0	100	25
For-profit private educational institution (school, training center, learning institute, etc.)	18.18	12.5	24.24	12.5	15.58
Non-profit educational institution (community, religious, philanthropic)	26.47	35.48	25	10	33.33
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	12.5	22.22	8.7	0	20

(concluded)

	Full distance learning (%)	Blended (%)	Open non-corporate (%)	Open corporate (%)	Blended (%)
Non-governmental organization (NGO) and third sector	0	0	16.67	0	25
Government or public body	40	75	16.67	26.32	33.33

Table 4.7 – Type of production or acquisition of distance learning audiovisual materials used by institutions, by type of course and administrative category

	Full distance learning (%)	Blended (%)	Open non-corporate (%)	Open corporate (%)	On-site (%)
Audiovisual materials produced autonomously within the institution (without outsourcing production steps)					
Federal public educational institution	75	73.91	52.94	50	23.53
State public educational institution	53.33	36.84	66.67	60	23.08
Municipal public educational institution	50	33.33	50	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	63.64	67.5	66.67	55	45.45
Non-profit educational institution (community, religious, philanthropic)	85.29	74.19	71.43	80	50
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	43.75	44.44	34.78	33.33	12
Non-governmental organization (NGO) and third sector	0	0	33.33	66.67	25
Government or public body	40	100	100	68.42	57.14
Average	51.38	53.78	59.48	51.68	29.53
Audiovisual materials produced autonomously within the institution (outsourcing production steps)					
Federal public educational institution	31.25	13.04	5.88	16.67	7.84
State public educational institution	46.67	15.79	33.33	10	7.69
Municipal public educational institution	50	0	0	0	0

(to be continued)

	Full distance learning (%)	Blended (%)	Open non- corporate (%)	Open corporate (%)	On-site (%)
For-profit private educational institution (school, training center, learning institute, etc.)	22.73	22.5	24.24	12.5	10.39
Non-profit educational institution (community, religious, philanthropic)	26.47	12.9	17.86	40	13.64
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	25	11.11	21.74	41.67	12
Non-governmental organization (NGO) and third sector	0	0	33.33	33.33	25
Government or public body	20	25	33.33	10.53	14.29
Audiovisual materials produced by third parties (commissioned and supervised by the institution)					
Federal public educational institution	6.25	4.35	0	0	0
State public educational institution	20	10.53	0	30	3.85
Municipal public educational institution	0	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	22.73	10	9.09	10	3.9
Non-profit educational institution (community, religious, philanthropic)	11.76	6.45	3.57	10	4.55
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	18.75	33.33	13.04	16.67	4
Non-governmental organization (NGO) and third sector	100	0	33.33	50	0
Government or public body	40	25	33.33	10.53	19.05
Audiovisual materials acquired from specialized suppliers					
Federal public educational institution	0	0	0	0	1.96
State public educational institution	0	5.26	0	0	0

(continued)

	Full distance learning (%)	Blended (%)	Open non- corporate (%)	Open corporate (%)	On-site (%)
Municipal public educational institution	0	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	11.36	10	10.61	2.5	2.6
Non-profit educational institution (community, religious, philanthropic)	2.94	3.23	10.71	10	1.52
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	0	11.11	8.7	8.33	8
Non-governmental organization (NGO) and third sector	0	0	0	0	0
Government or public body	20	25	0	0	9.52
Free audiovisual materials adapted within the institution					
Federal public educational institution	21.88	17.39	5.88	50	13.73
State public educational institution	33.33	15.79	50	20	11.54
Municipal public educational institution	0	33.33	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	15.91	20	16.67	7.5	10.39
Non-profit educational institution (community, religious, philanthropic)	8.82	6.45	7.14	20	10.61
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	0	0	8.7	0	16
Non-governmental organization (NGO) and third sector	0	0	0	16.67	0
Government or public body	40	50	0	5.26	19.05
Free audiovisual materials used as is					
Federal public educational institution	50	39.13	5.88	16.67	15.69

	Full distance learning (%)	Blended (%)	Open non- corporate (%)	Open corporate (%)	On-site (%)
State public educational institution	53.33	21.05	66.67	30	23.08
Municipal public educational institution	0	66.67	0	100	0
For-profit private educational institution (school, training center, learning institute, etc.)	22.73	17.5	25.76	15	11.69
Non-profit educational institution (community, religious, philanthropic)	20.59	35.48	28.57	10	30.3
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	6.25	11.11	13.04	0	16
Non-governmental organization (NGO) and third sector	0	0	0	0	25
Government or public body	40	75	16.67	21.05	28.57

Table 4.8 – Type of production or acquisition of distance learning technological resources used by institutions, by type of course and administrative category

	Full distance learning (%)	Blended (%)	Open non- corporate (%)	Open corporate (%)	On-site (%)
Resources produced autonomously within the institution (without outsourcing production steps)					
Federal public educational institution	59.38	39.13	41.18	16.67	27.45
State public educational institution	33.33	15.79	33.33	30	3.85
Municipal public educational institution	0	33.33	50	100	0
For-profit private educational institution (school, training center, learning institute, etc.)	47.73	55	46.97	47.5	33.77
Non-profit educational institution (community, religious, philanthropic)	55.88	64.52	50	50	33.33

(to be continued)

	Full distance learning (%)	Blended (%)	Open non- corporate (%)	Open corporate (%)	On-site (%)
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	37.5	33.33	34.78	8.33	12
Non-governmental organization (NGO) and third sector	0	0	33.33	50	0
Government or public body	40	50	66.67	42.11	38.1
Resources produced within the institution (outsourcing production steps)					
Federal public educational institution	9.38	4.35	0	16.67	5.88
State public educational institution	13.33	5.26	16.67	10	7.69
Municipal public educational institution	50	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	18.18	15	10.61	10	7.79
Non-profit educational institution (community, religious, philanthropic)	17.65	12.9	10.71	40	9.09
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	18.75	11.11	17.39	33.33	16
Non-governmental organization (NGO) and third sector	0	0	16.67	16.67	0
Government or public body	20	25	16.67	10.53	9.52
Resources produced by third parties (commissioned and supervised by the institution)					
Federal public educational institution	6.25	0	0	0	1.96
State public educational institution	6.67	5.26	0	20	0
Municipal public educational institution	0	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	18.18	10	12.12	12.5	5.19

	Full distance learning (%)	Blended (%)	Open non- corporate (%)	Open corporate (%)	On-site (%)
Non-profit educational institution (community, religious, philanthropic)	5.88	9.68	7.14	10	3.03
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	6.25	33.33	17.39	16.67	4
Non-governmental organization (NGO) and third sector	0	0	33.33	33.33	25
Government or public body	40	25	16.67	10.53	9.52
Resources acquired from specialized suppliers					
Federal public educational institution	0	0	0	0	3.92
State public educational institution	6.67	5.26	16.67	10	0
Municipal public educational institution	0	0	0	100	0
For-profit private educational institution (school, training center, learning institute, etc.)	9.09	0	6.06	2.5	3.9
Non-profit educational institution (community, religious, philanthropic)	0	3.23	7.14	10	4.55
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	0	22.22	8.7	8.33	12
Non-governmental organization (NGO) and third sector	0	0	16.67	0	0
Government or public body	20	25	0	0	4.76
Free resources adapted within the institution					
Federal public educational institution	18.75	21.74	0	16.67	9.8
State public educational institution	20	5.26	50	0	3.85
Municipal public educational institution	50	0	0	0	0

	Full distance learning (%)	Blended (%)	Open non- corporate (%)	Open corporate (%)	On-site (%)
For-profit private educational institution (school, training center, learning institute, etc.)	15.91	20	10.61	7.5	9.09
Non-profit educational institution (community, religious, philanthropic)	5.88	12.9	7.14	10	12.12
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	6.25	22.22	8.7	0	16
Non-governmental organization (NGO) and third sector	0	0	0	0	0
Government or public body	40	25	0	5.26	9.52
Free resources used as is					
Federal public educational institution	40.63	26.09	23.53	0	17.65
State public educational institution	33.33	21.05	100	20	15.38
Municipal public educational institution	0	66.67	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	20.45	17.5	25.76	12.5	9.09
Non-profit educational institution (community, religious, philanthropic)	8.82	22.58	28.57	10	24.24
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	0	0	4.35	0	16
Non-governmental organization (NGO) and third sector	0	0	0	0	0
Government or public body	20	75	16.67	10.53	14.29

Part 5 – Management of educational institutions and current state of the distance learning market

Table 5.1 – Institutions with centralized distance learning management, by administrative category

Administrative category	No.	(%)
Federal public educational institution	34	59.65
State public educational institution	21	70
Municipal public educational institution	6	100
For-profit private educational institution (school, training center, learning institute, etc.)	74	64.35
Non-profit educational institution (community, religious, philanthropic)	52	73.24
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	15	55.56
Non-governmental organization (NGO) and third sector	7	63.64
Government or public body	18	75

Table 5.2 – Percentage of institutions that declared an increase in investments in 2015, by administrative category

	Full distance learning	Blended	Non-corporate	Corporate	On-site
Federal public educational institution	20	13.04	0	10.52	0
State public educational institution	0	0	0	0	0
Municipal public educational institution	0	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	18.18	17.5	30.3	22.5	18.18
Non-profit private educational institution (community, religious, philanthropic)	29.41	22.58	35.71	10	18.19
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	18.75	22.22	13.05	25	16
Non-governmental organization (NGO) and third sector	0	0	16.67	16.67	0
Government or public body	20	0	0	10.52	4.76

Table 5.3 – Percentage of institutions that declared an increase in the volume of investments, by type of course

Percentage of increase	Full distance learning	Blended	Non-corporate	Corporate	On-site
Up to 25%	7.93	13.95	10.21	12.87	13.49
26%-50%	7.49	2.46	4.66	4.27	5.26
51%-75%	0.37	0.63	4.21	0	0.64
76%-100%	1.07	3.18	0	2.4	0.6
More than 100%	1.3	0.31	3	0.97	0

Table 5.4 – Percentage of institutions that declared the volume of investments remained constant, by administrative category

Administrative category	Investments remained constant
Federal public educational institution	19.79
State public educational institution	23.78
Municipal public educational institution	75
For-profit private educational institution (school, training center, learning institute, etc.)	23.52
Non-profit educational institution (community, religious, philanthropic)	39.8
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	30.06
Non-governmental organization (NGO) and third sector	25
Government or public body	47.85

Table 5.5 – Percentage of institutions that declared the volume of investments remained constant, by type of course

Full distance learning	24.75
Blended	34.30
Non-corporate	47.85
Corporate	43.08
On-site	28.02

Table 5.6 – Percentage of institutions that declared a decrease in the volume of investments, by type of course

Percentage of decrease	Full distance learning	Blended	Non-corporate	Corporate	On-site
Up to 25%	2.99	1.49	0.57	4.03	3.86
26%-50%	3.94	3.69	0.19	2.22	1.31
51%-75%	7.58	3.02	0	1.56	0.6
76%-100%	0.78	3.67	1.11	0	0.16
More than 100%	0	0	0	0	0

Table 5.7 – Percentage of institutions that declared a decrease in the volume of investments, by administrative category

Administrative category	Up to 25%	26%-50%	51%-75%	76%-100%	More than 100%
Federal public educational institution	4.33	10.29	10.73	2.05	0
State public educational institution	4.2	4.39	6	0	0
Municipal public educational institution	0	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	3.6	1.82	0.5	0.87	0
Non-profit educational institution (community, religious, philanthropic)	1.23	0.59	0	0	0
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	0	0	2.22	1.25	0
Non-governmental organization (NGO) and third sector	3.33	0	0	0	0
Government or public body	4.01	1.05	0.95	5	0

Table 5.8 – Percentage of institutions that declared an increase in investments in 2016, by administrative category

Administrative category	Full distance learning	Blended	Non-corporate	Corporate	On-site
Federal public educational institution	6.26	13.05	5.88	0	1.96
State public educational institution	13.34	5.26	0	0	7.69
Municipal public educational institution	0	99.99	50	100	0
For-profit private educational institution (school, training center, learning institute, etc.)	34.09	32.5	33.35	22.5	20.78
Non-profit private educational institution (community, religious, philanthropic)	41.17	35.49	57.13	20	21.21
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	31.25	44.44	17.39	16.66	12

(to be continued)

(concluded)

Administrative category	Full distance learning	Blended	Non-corporate	Corporate	On-site
Non-governmental organization (NGO) and third sector	0	0	33.34	16.67	25
Government or public body	60	25	50	26.32	19.04

Table 5.9 – Percentage of institutions that intend to increase investments in 2016, by type of course

Percentage of increase	Full distance learning	Blended	Non-corporate	Corporate	On-site
Up to 25%	12.85	14.88	15.94	6.21	10.44
26%-50%	7.4	11.76	11.73	4.89	2.42
51%-75%	0.28	4.48	0.64	12.5	0
76%-100%	1.02	0.31	1.02	1.35	0.6
More than 100%	1.72	0.54	1.56	0.31	0

Table 5.10 – Percentage of institutions that intend to maintain investments constant in 2016, by administrative category

Administrative category	
Federal public educational institution	12.84
State public educational institution	19.85
Municipal public educational institution	15
For-profit private educational institution (school, training center, learning institute, etc.)	23.67
Non-profit educational institution (community, religious, philanthropic)	30.34
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	26.62
Non-governmental organization (NGO) and third sector	16.67
Government or public body	18.83

Table 5.11 – Percentage of institutions that intend to maintain investments constant in 2016, by type of course

Full distance learning	10.5
Blended	17.6
Non-corporate	30.44
Corporate	25.69
On-site	18.16

Table 5.12 – Percentage of institutions that intend to reduce investments in 2016, by administrative category

Administrative category	Up to 25%	26%-50%	51%-75%	76%-100%
Federal public educational institution	2.59	6.05	2.75	0
State public educational institution	0	7.16	0	0
Municipal public educational institution	0	0	0	5
For-profit private educational institution (school, training center, learning institute, etc.)	2.39	2.11	0.52	1.06
Non-profit educational institution (community, religious, philanthropic)	0.65	0.59	0	0
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	2.54	1.25	0	0
Non-governmental organization (NGO) and third sector	8.33	0	0	0
Government or public body	2.96	1.90	2.96	0

Table 5.13 – Percentage of institutions that intend to reduce investments in 2016, by type of course

Percentage of decrease	Full distance learning	Blended	Non-corporate	Corporate	On-site
Up to 25%	0.39	0.72	3.74	2.01	5.29
26%-50%	5.66	2.6	0.38	0.63	2.65
51%-75%	1.17	0.54	0	0.66	1.52
76%-100%	0	0	0.19	0.31	3.29
More than 100%	0	0	0	0	0

Table 5.14 – Percentage of areas that received increase in investments, by type of course and administrative category

Wages	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	0	0	0	0	1.96
State public educational institution	6.67	0	0	0	3.85
Municipal public educational institution	0	0	50	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	20.45	15	16.67	17.5	23.38
Non-profit educational institution (community, religious, philanthropic)	20.59	19.35	7.14	10	15.15
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	0	0	8.7	8.33	12

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Non-governmental organization (NGO) and third sector	0	0	16.67	0	0
Government or public body	0	0	0	5.26	4.76
Personnel hiring	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	6.25	8.7	5.88	0	7.84
State public educational institution	0	5.26	0	0	11.54
Municipal public educational institution	50	33.33	0	0	25
For-profit private educational institution (school. training center. learning institute. etc.)	34.09	25	19.7	15	24.68
Non-profit educational institution (community. religious. philanthropic)	32.35	22.58	21.43	20	22.73
"S System" institution (Senai. Sesi. Senac. Sesc. Senat. Sebrae. etc.)	6.25	22.22	4.35	8.33	16
Non-governmental organization (NGO) and third sector	0	0	50	33.33	0
Government or public body	20	25	0	0	9.52
Training	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	6.25	21.74	17.65	33.33	3.92
State public educational institution	13.33	15.79	0	0	11.54
Municipal public educational institution	50	66.67	0	0	0
For-profit private educational institution (school. training center. learning institute. etc.)	31.82	35	18.18	10	23.38
Non-profit educational institution (community. religious. philanthropic)	38.24	32.26	25	20	25.76
"S System" institution (Senai. Sesi. Senac. Sesc. Senat. Sebrae. etc.)	12.5	44.44	17.39	16.67	32
Non-governmental organization (NGO) and third sector	0	0	16.67	33.33	25
Government or public body	40	25	0	26.32	23.81

Technology and innovation	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	6.25	13.04	0	33.33	3.92
State public educational institution	6.67	15.79	0	0	3.85
Municipal public educational institution	50	33.33	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	47.73	47.5	43.94	20	33.77
Non-profit educational institution (community, religious, philanthropic)	52.94	32.26	35.71	30	27.27
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	12.5	33.33	21.74	25	24
Non-governmental organization (NGO) and third sector	100	0	33.33	16.67	0
Government or public body	20	0	0	21.05	9.52
Sales and marketing	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	0	0	0	0	0
State public educational institution	0	0	0	0	0
Municipal public educational institution	50	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	36.36	22.5	28.79	20	23.38
Non-profit educational institution (community, religious, philanthropic)	23.53	3.23	10.71	10	3.03
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	6.25	11.11	13.04	0	8
Non-governmental organization (NGO) and third sector	0	0	0	0	0
Government or public body	0	0	0	0	0

(continued)

Production of new courses and modules	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	9.38	13.04	11.76	16.67	1.96
State public educational institution	13.33	5.26	16.67	0	3.85
Municipal public educational institution	50	0	0	0	25
For-profit private educational institution (school, training center, learning institute, etc.)	31.82	17.5	40.91	30	22.08
Non-profit educational institution (community, religious, philanthropic)	44.12	22.58	35.71	40	18.18
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	25	22.22	13.04	8.33	16
Non-governmental organization (NGO) and third sector	100	0	83.33	33.33	0
Government or public body	20	25	0	21.05	14.29
Content production	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	9.38	8.7	5.88	33.33	0
State public educational institution	13.33	10.53	0	10	7.69
Municipal public educational institution	50	33.33	50	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	43.18	35	34.85	25	20.78
Non-profit educational institution (community, religious, philanthropic)	50	25.81	32.14	30	6.06
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	18.75	22.22	8.7	8.33	12
Non-governmental organization (NGO) and third sector	100	0	50	33.33	0
Government or public body	40	25	0	21.05	14.29

Logistics and infrastructure	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	3.13	4.35	0	0	3.92
State public educational institution	0	0	0	0	7.69
Municipal public educational institution	50	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	15.91	25	7.58	5	19.48
Non-profit educational institution (community, religious, philanthropic)	29.41	6.45	10.71	20	24.24
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	18.75	33.33	8.7	8.33	24
Non-governmental organization (NGO) and third sector	0	0	0	0	25
Government or public body	20	0	16.67	5.26	0
None	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	43.75	34.78	29.41	0	13.73
State public educational institution	20	5.26	50	10	3.85
Municipal public educational institution	50	33.33	50	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	0	0	10.61	17.5	6.49
Non-profit educational institution (community, religious, philanthropic)	8.82	3.23	14.29	10	4.55
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	6.25	22.22	21.74	8.33	0
Non-governmental organization (NGO) and third sector	0	0	16.67	16.67	0
Government or public body	0	25	33.33	21.05	23.81

Table 5.15 – Percentage of institutions that declared an increase in income, by administrative category

Administrative category	Full distance learning	Blended	Non-corporate	Corporate	On-site
Federal public educational institution	0	13.04	0	0	0
State public educational institution	0	0	0	0	0
Municipal public educational institution	0	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	18.18	17.5	30.3	22.5	18.18
Non-profit private educational institution (community, religious, philanthropic)	29.41	22.58	35.71	10	18.19
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	18.75	22.22	13.05	25	16
Non-governmental organization (NGO) and third sector	0	0	16.67	16.67	0
Government or public body	20	0	0	10.52	4.76

Table 5.16 – Percentage of institutions that declared an increase in income, by type of course

Percentage of increase	Full distance learning	Blended	Non-corporate	Corporate	On-site
Up to 25%	5.11	7	5.66	5.97	6.63
26%-50%	4.25	0.63	2.84	1.6	0.33
51%-75%	0	0.4	0.83	0	0.19
76%-100%	0.37	0	0.54	2.4	0
More than 100%	1.07	1.39	2.1	0.63	0

(concluded)

Table 5.17 – Percentage of institutions that declared income remained constant, by administrative category

Administrative category	
Federal public educational institution	10.54
State public educational institution	11.64
Municipal public educational institution	63.33
For-profit private educational institution (school, training center, learning institute, etc.)	27.07
Non-profit educational institution (community, religious, philanthropic)	34.97
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	23.32

(to be continued)

Administrative category

Non-governmental organization (NGO) and third sector	6.67
Government or public body	22.91

Table 5.18 – Percentage of institutions that declared income remained constant, by type of course

Full distance learning	15
Blended	23.43
Non-corporate	40.58
Corporate	25.66
On-site	20.62

Table 5.19 – Percentage of institutions that declared a decrease in income, by administrative category

Administrative category	Up to 25%	26%-50%	51%-75%	76%-100%	More than 100%
Federal public educational institution	0.39	0	1.5	0	0
State public educational institution	0	1.05	0	0	0
Municipal public educational institution	0	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	5.83	3.6	0.76	0.3	0
Non-profit educational institution (community, religious, philanthropic)	2.37	1.23	2	0.71	0
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	0	0	0	0	0
Non-governmental organization (NGO) and third sector	13.33	0	0	0	0
Government or public body	0	0	0	0	0

Table 5.20 – Percentage of institutions that declared a decrease in income, by type of course

Percentage of decrease	Full distance learning	Blended	Open	Corporate	On-site
Up to 25%	2.24	0.63	0.76	2.4	7.69
26%-50%	0.94	1.06	0.57	0.63	0.49
51%-75%	0.39	0.54	0	1.56	0.16
76%-100%	0	0	0.64	0	0
More than 100%	0	0	0	0	0

Table 5.21 – Percentage of institutions that declared an increase in number of enrollments, by administrative category

Administrative category	Full distance learning	Blended	Non-corporate	Corporate	On-site
Federal public educational institution	18.76	34.78	35.28	16.67	31.37
State public educational institution	20	26.31	33.34	30	15.39
Municipal public educational institution	50	0	50	0	50
For-profit private educational institution (school, training center, learning institute, etc.)	45.46	35	45.46	30	28.57

(to be continued)

(concluded)

Administrative category	Full distance learning	Blended	Non-corporate	Corporate	On-site
Non-profit private educational institution (community, religious, philanthropic)	26.47	16.13	35.71	10	13.64
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	50	77.77	56.52	33.34	28
Non-governmental organization (NGO) and third sector	0	0	66.67	33.34	0
Government or public body	60	25	33.34	52.63	28.57

Table 5.22 – Percentage of institutions that declared an increase in number of enrollments, by type of course

Percentage of increase	Full distance learning	Blended	Open	Corporate	On-site
Up to 25%	13.61	11.69	20.2	12.95	15.71
26%-50%	10.23	3.72	10.22	4.58	3.58
51%-75%	4.24	3.63	3.29	2.57	1.28
76%-100%	2.21	6.45	5.46	1.28	3.13
More than 100%	3.54	1.39	5.37	4.37	0.75

Table 5.23 – Percentage of institutions that declared number of enrollments remained constant, by administrative category

Administrative category	
Federal public educational institution	26.69
State public educational institution	27.88
Municipal public educational institution	43.33
For-profit private educational institution (school, training center, learning institute, etc.)	25.93
Non-profit educational institution (community, religious, philanthropic)	50.86
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	17.03
Non-governmental organization (NGO) and third sector	23.33
Government or public body	34.98

Table 5.24 – Percentage of institutions that declared number of enrollments remained constant, by type of course

Full distance learning	23.15
Blended	32.17
Non-corporate	33.27
Corporate	42.77
On-site	24.92

Table 5.25 – Percentage of institutions that declared a decrease in number of enrollments, by administrative category

Administrative category	Up to 25%	26%-50%	51%-75%	76%-100%	More than 100%
Federal public educational institution	11.1	2.75	1.50	0	0
State public educational institution	5.74	7.33	0	0	0
Municipal public educational institution	0	10	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	8.76	2.78	1.28	0	0
Non-profit educational institution (community, religious, philanthropic)	7.79	1.48	2.71	0	0
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	4.76	0.8	3.09	0	0
Non-governmental organization (NGO) and third sector	8.33	0	0	0	0
Government or public body	5.92	0	0.95	0	0

Table 5.26 – Percentage of institutions that declared a decrease in number of enrollments, by type of course

Percentage of decrease	Full distance learning	Blended	Non-corporate	Corporate	On-site
Up to 25%	6.64	6.19	1.91	6.42	11.59
26%-50%	8.73	0.54	2.46	3.13	0.85
51%-75%	0.39	1.93	0.99	1.56	1.08
76%-100%	0	0	0	0	0
More than 100%	0	0	0	0	0

Part 6 – Current practices in distance learning

Table 6.1 – Workload of accredited full distance learning courses

Administrative category	Courses with workload lower than 360 hours		Courses with 360-699 hour workload		Courses with workload higher than 700 hours	
	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)
Federal public educational institution	7	21.88	13	40.63	29	90.63
State public educational institution	3	20	5	33.33	8	53.33
Municipal public educational institution	1	50	0	0	1	50

(to be continued)

(concluded)

Administrative category	Courses with workload lower than 360 hours		Courses with 360-699 hour workload		Courses with workload higher than 700 hours	
	No. of institutions	(%)	Full distance learning		No. of institutions	(%)
For-profit private educational institution (school, training center, learning institute, etc.)	7	15.91	18	40.91	25	56.82
Non-profit educational institution (community, religious, philanthropic)	4	11.76	15	44.12	22	64.71
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	7	43.75	2	12.5	6	37.5
Non-governmental organization (NGO) and third sector	1	100	0	0	0	0
Government or public body	4	80	2	40	1	20

Table 6.2 – Workload of distance learning disciplines in blended courses

Administrative category	Disciplines with workload lower than 20 hours		Disciplines with 21-40 hour workload		Disciplines with 41-60 hour workload		Disciplines with workload higher than 60 hours	
			Blended courses					
	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)
Federal public educational institution	4	17.39	9	39.13	14	60.87	9	39.13
State public educational institution	3	15.79	5	26.32	5	26.32	9	47.37
Municipal public educational institution	0	0	1	33.33	0	0	2	66.67
For-profit private educational institution (school, training center, learning institute, etc.)	6	15	13	32.5	17	42.5	15	37.5
Non-profit educational institution (community, religious, philanthropic)	9	29.03	12	38.71	15	48.39	9	29.03

(to be continued)

Administrative category	Disciplines with workload lower than 20 hours		Disciplines with 21-40 hour workload		Disciplines with 41-60 hour workload		Disciplines with workload higher than 60 hours	
	Blended courses							
	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	1	11.11	4	44.44	4	44.44	7	77.78
Non-governmental organization (NGO) and third sector	0	0	0	0	0	0	0	0
Government or public body	2	50	3	75	0	0	0	0

Table 6.3 – Workload of non-corporate open courses

Adminis- trative category	Up to 2 hours		2-10 hours		11-40 hours		41-80 hours		81-160 hours		161-359 hours		360-699 hours		Over 700 hours	
	Open non-corporate															
	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)
Federal pub- lic educational institution	1	5.88	1	5.88	4	23.53	8	47.06	7	41.18	3	17.65	0	0	1	5.88
State public educational institution	0	0	0	0	3	50	4	66.67	1	16.67	0	0	0	0	0	0
Municipal public edu- cational institution	0	0	0	0	0	0	2	100	0	0	0	0	0	0	0	0
For-profit pri- vate edu- cational institution (school, train- ing center, learning insti- tute, etc.)	4	6.06	9	13.64	37	56.06	26	39.39	20	30.3	10	15.15	5	7.58	2	3.03

(to be continued)

(concluded)

Administrative category	Up to 2 hours		2-10 hours		11-40 hours		41-80 hours		81-160 hours		161-359 hours		360-699 hours		Over 700 hours	
	Open non-corporate															
	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)
Non-profit educational institution (community, religious, philanthropic)	1	3.57	2	7.14	16	57.14	9	32.14	6	21.43	1	3.57	1	3.57	1	3.57
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	0	0	2	8.7	17	73.91	7	30.43	5	21.74	1	4.35	1	4.35	1	4.35
Non-governmental organization (NGO) and third sector	2	33.33	3	50	5	83.33	2	33.33	1	16.67	1	16.67	1	16.67	0	0
Government or public body	0	0	1	16.67	5	83.33	1	16.67	0	0	0	0	0	0	0	0

Table 6.4 – Workload of corporate open courses

Adminis- trative category	Up to 2 hours		2-10 hours		11-40 hours		41-80 hours		81-160 hours		161-359 hours		360-699 hours		Over 700 hours	
	Open corporate															
	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)
Federal pub- lic educational institution	0	0	0	0	2	33.33	2	33.33	3	50	2	33.33	0	0	1	16.67
State public educational institution	1	10	0	0	6	60	1	10	0	0	1	10	0	0	0	0
Municipal pub- lic educational institution	0	0	0	0	0	0	0	0	0	0	1	100	0	0	0	0

(to be continued)

Adminis- trative category	Up to 2 hours		2-10 hours		11-40 hours		41-80 hours		81-160 hours		161-359 hours		360-699 hours		Over 700 hours	
	Open corporate															
	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)	No. of institutions	(%)
For-profit pri- vate edu- cational institution (school, train- ing center, learning insti- tute, etc.)	1	2.5	7	17.5	14	35	7	17.5	5	12.5	3	7.5	1	2.5	0	0
Non-profit educational institution (community, religious, phil- anthropic)	1	10	2	20	1	10	4	40	0	0	0	0	1	10	0	0
“S System” insti- tution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	0	0	6	50	6	50	4	33.33	3	25	0	0	1	8.33	1	8.33
Non-govern- mental orga- nization (NGO) and third sector	2	33.33	3	50	4	66.67	2	33.33	1	16.67	0	0	0	0	0	0
Government or public body	4	21.05	5	26.32	10	52.63	11	57.89	3	15.79	1	5.26	0	0	0	0

Table 6.5 – Classroom organization

Administrative category	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)
Classrooms with up to 30 students				
Federal public educational institution	50	43.48	52.94	50
State public educational institution	20	26.32	50	40
Municipal public educational institution	50	33.33	50	100
For-profit private educational institution (school, training center, learning institute, etc.)	15.91	22.5	25.76	32.5
Non-profit educational institution (community, religious, philanthropic)	17.65	22.58	17.86	40
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	12.5	22.22	21.74	25

(to be continued)

Administrative category	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)
Non-governmental organization (NGO) and third sector	0	0	33.33	16.67
Government or public body	20	75	16.67	52.63
Classrooms with 31-50 students				
Federal public educational institution	53.13	60.87	35.29	33.33
State public educational institution	60	31.58	66.67	20
Municipal public educational institution	0	66.67	100	0
Non-profit educational institution (community, religious, philanthropic)	18.18	37.5	16.67	12.5
For-profit private educational institution (school, training center, learning institute, etc.)	38.24	45.16	35.71	30
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	43.75	55.56	21.74	33.33
Non-governmental organization (NGO) and third sector	0	0	33.33	33.33
Government or public body	40	25	33.33	47.37
Classrooms with 51-100 students				
Federal public educational institution	12.5	13.04	23.53	50
State public educational institution	0	0	16.67	0
Municipal public educational institution	0	0	0	0
Non-profit educational institution (community, religious, philanthropic)	22.73	25	6.06	5
For-profit private educational institution (school, training center, learning institute, etc.)	26.47	19.35	3.57	10
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	12.5	11.11	13.04	8.33
Non-governmental organization (NGO) and third sector	0	0	33.33	33.33
Government or public body	20	0	33.33	10.53
Classrooms with 101-500 students				
Federal public educational institution	3.13	4.35	5.88	0
State public educational institution	6.67	0	16.67	0
Municipal public educational institution	0	0	0	0
Non-profit educational institution (community, religious, philanthropic)	4.55	5	7.58	2.5
For-profit private educational institution (school, training center, learning institute, etc.)	14.71	9.68	7.14	0
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	0	11.11	13.04	0

Administrative category	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)
Non-governmental organization (NGO) and third sector	0	0	33.33	16.67
Government or public body	20	0	0	5.26
Classrooms with 501-1,000 students				
Federal public educational institution	0	0	0	0
State public educational institution	0	0	0	0
Municipal public educational institution	0	0	0	0
Non-profit educational institution (community, religious, philanthropic)	0	2.5	3.03	2.5
For-profit private educational institution (school, training center, learning institute, etc.)	2.94	3.23	0	0
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	0	0	4.35	0
Non-governmental organization (NGO) and third sector	0	0	0	0
Government or public body	0	0	0	0
Not organized into classrooms and no maximum student limit per course (massive open online courses – Moocs – or similar)				
Federal public educational institution	9.38	0	5.88	0
State public educational institution	6.67	10.53	33.33	20
Municipal public educational institution	0	0	0	0
Non-profit educational institution (community, religious, philanthropic)	20.45	7.5	30.3	15
For-profit private educational institution (school, training center, learning institute, etc.)	8.82	3.23	25	20
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	18.75	0	43.48	16.67
Non-governmental organization (NGO) and third sector	100	0	16.67	33.33
Government or public body	40	0	33.33	21.05
Other forms of organization				
Federal public educational institution	3.13	4.35	0	0
State public educational institution	0	10.53	0	0
Municipal public educational institution	50	0	0	0
Non-profit educational institution (community, religious, philanthropic)	31.82	12.5	10.61	12.5
For-profit private educational institution (school, training center, learning institute, etc.)	20.59	9.68	17.86	0
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	6.25	11.11	8.7	16.67

(concluded)

Administrative category	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)
Non-governmental organization (NGO) and third sector	0	0	0	0
Government or public body	0	0	0	5.26

Table 6.6 – Content-related support provided to students, by type of course

Administrative category	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)
No support				
Federal public educational institution	0	0	0	0
State public educational institution	0	0	16.67	20
Municipal public educational institution	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	0	0	3.03	5
Non-profit educational institution (community, religious, philanthropic)	0	0	3.57	0
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	0	0	0	0
Non-governmental organization (NGO) and third sector	0	0	0	0
Government or public body	0	0	0	0
On-site student support, at the headquarters or hubs				
Federal public educational institution	0	0	0	0
State public educational institution	0	0	0	0
Municipal public educational institution	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	2.27	0	0	0
Non-profit educational institution (community, religious, philanthropic)	2.94	0	0	0
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	12.5	0	0	0
Non-governmental organization (NGO) and third sector	0	0	0	0
Government or public body	0	0	0	0

(to be continued)

Administrative category	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)
Online student support via chat, videoconferencing, email, message boards etc.				
Federal public educational institution	18.75	0	0	0
State public educational institution	13.33	5.26	0	0
Municipal public educational institution	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	15.91	10	0	0
Non-profit educational institution (community, religious, philanthropic)	26.47	6.45	0	0
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	18.75	11.11	0	0
Non-governmental organization (NGO) and third sector	100	0	0	0
Government or public body	60	50	0	0
On-site and online student support				
Federal public educational institution	75	82.61	47.06	33.33
State public educational institution	80	63.16	0	30
Municipal public educational institution	100	100	0	100
For-profit private educational institution (school, training center, learning institute, etc.)	81.82	75	24.24	27.5
Non-profit educational institution (community, religious, philanthropic)	67.65	87.1	42.86	60
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	62.5	88.89	43.48	25
Non-governmental organization (NGO) and third sector	0	0	16.67	16.67
Government or public body	40	50	16.67	52.63

Table 6.7 – Option for open source or proprietary virtual learning management system, by type of course

Administrative category	Open source learning management system, customized within the institution (%)	Open source learning management system, customized by third parties (%)	Proprietary learning management system (%)	learning management system created by the institution (%)	Non-customized open source learning management system (%)
Government or public body	70,74	16,34	4,39	3,06	2
Federal public educational institution	63,62	2,99	0,39	6,99	10,98

(concluded)

Administrative category	Open source learning management system, customized within the institution (%)	Open source learning management system, customized by third parties (%)	Proprietary learning management system (%)	learning management system created by the institution (%)	Non-customized open source learning management system (%)
Municipal public educational institution	63,33	40	0	26,67	33,33
Non-profit educational institution (community, religious, philanthropic)	61,64	11,86	10,68	9,2	6,46
State public educational institution	59,83	7,54	2,1	9,16	4,1
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	36,44	19,81	17,26	3,27	0,8
For-profit private educational institution (school, training center, learning institute, etc.)	29,55	11,36	30,92	21,46	7,09
Non-governmental organization (NGO) and third sector	21,67	23,33	33,33	28,33	0

Table 6.8 – Types of LMS used, by type of course

Type of LMS	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Open source learning management system, customized within the institution	46.79	54.01	65.93	56.61	30.94
Open source learning management system, customized by third parties	22.84	8.97	13.37	32.88	5.21
Proprietary learning management system	20.83	11.14	15.35	8.47	6.14
Learning management system created by the institution	19.67	11.28	7.13	19.96	9.55
Non-customized open source learning management system	4.2	11.08	4.24	16.28	4.7
No learning management system	2.58	0	0	0	25.9

Table 6.9 – Channels of student communication through the learning management system (LMS)

Administrative category	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Message board					
Federal public educational institution	93.75	95.65	76.47	83.33	25.49
State public educational institution	73.33	63.16	100	50	34.62
Municipal public educational institution	100	100	100	100	50
For-profit private educational institution (school, training center, learning institute, etc.)	81.82	75	65.15	55	38.96
Non-profit educational institution (community, religious, philanthropic)	91.18	83.87	85.71	70	45.45
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	56.25	77.78	43.48	83.33	12
Non-governmental organization (NGO) and third sector	0	0	83.33	83.33	0
Government or public body	80	100	50	73.68	33.33
Chat					
Federal public educational institution	81.25	95.65	64.71	83.33	23.53
State public educational institution	46.67	42.11	50	40	26.92
Municipal public educational institution	100	100	100	100	25
For-profit private educational institution (school, training center, learning institute, etc.)	75	60	51.52	37.5	29.87
Non-profit educational institution (community, religious, philanthropic)	70.59	58.06	50	30	27.27
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	37.5	66.67	34.78	58.33	4
Non-governmental organization (NGO) and third sector	0	0	66.67	66.67	0

(to be continued)

(continued)

Administrative category	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Government or public body	60	50	16.67	52.63	14.29
Email					
Federal public educational institution	87.5	95.65	70.59	83.33	43.14
State public educational institution	73.33	68.42	83.33	50	50
Municipal public educational institution	100	66.67	100	100	50
For-profit private educational institution (school, training center, learning institute, etc.)	93.18	90	83.33	67.5	61.04
Non-profit educational institution (community, religious, philanthropic)	91.18	90.32	89.29	90	65.15
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	87.5	77.78	86.96	66.67	32
Non-governmental organization (NGO) and third sector	100	0	100	66.67	25
Government or public body	80	75	100	89.47	71.43
SMS					
Federal public educational institution	18.75	21.74	11.76	16.67	7.84
State public educational institution	6.67	15.79	0	10	7.69
Municipal public educational institution	0	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	40.91	37.5	22.73	12.5	24.68

Administrative category	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Non-profit educational institution (community, religious, philanthropic)	29.41	22.58	10.71	10	28.79
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	6.25	33.33	21.74	16.67	8
Non-governmental organization (NGO) and third sector	0	0	33.33	33.33	0
Government or public body	40	25	16.67	10.53	4.76
Internal social network					
Federal public educational institution	25	21.74	11.76	33.33	11.76
State public educational institution	13.33	5.26	50	20	7.69
Municipal public educational institution	0	0	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	31.82	25	15.15	12.5	24.68
Non-profit educational institution (community, religious, philanthropic)	17.65	19.35	7.14	20	21.21
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	6.25	44.44	4.35	8.33	12
Non-governmental organization (NGO) and third sector	100	0	33.33	33.33	25
Government or public body	40	25	0	5.26	4.76
Newsboard					
Federal public educational institution	65.63	65.22	35.29	33.33	25.49
State public educational institution	66.67	52.63	83.33	60	26.92
Municipal public educational institution	0	66.67	50	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	70.45	65	46.97	37.5	35.06

(concluded)

Administrative category	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Non-profit educational institution (community, religious, philanthropic)	58.82	61.29	53.57	40	37.88
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	56.25	55.56	26.09	8.33	12
Non-governmental organization (NGO) and third sector	0	0	66.67	66.67	0
Government or public body	40	0	50	57.89	14.29
Automatic notifications					
Federal public educational institution	43.75	43.48	17.65	16.67	11.76
State public educational institution	20	31.58	66.67	30	15.38
Municipal public educational institution	0	33.33	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	59.09	35	39.39	30	22.08
Non-profit educational institution (community, religious, philanthropic)	41.18	22.58	25	20	24.24
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	12.5	55.56	13.04	0	0
Non-governmental organization (NGO) and third sector	0	0	50	50	0
Government or public body	20	25	50	26.32	14.29

Table 6.10 – Institutions that integrate their learning management system to their academic system, by type of course and administrative category

Administrative category	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	50	43.48	23.53	16.67	33.33
State public educational institution	33.33	47.37	33.33	30	19.23

(to be continued)

Administrative category	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Municipal public educational institution	0	100	50	100	50
For-profit private educational institution (school, training center, learning institute, etc.)	86.36	75	40.91	35	55.84
Non-profit educational institution (community, religious, philanthropic)	82.35	70.97	46.43	50	57.58
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	43.75	77.78	47.83	33.33	12
Non-governmental organization (NGO) and third sector	0	0	33.33	50	25
Government or public body	20	50	16.67	31.58	23.81

Table 6.11 – Institutions that implemented a local or cloud-based learning management system, or both

Administrative category	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Cloud-based					
Federal public educational institution	9.38	0	5.88	0	3.92
State public educational institution	6.67	10.53	0	10	7.69
Municipal public educational institution	50	0	0	100	0
For-profit private educational institution (school, training center, learning institute, etc.)	31.82	27.5	43.94	42.5	29.87
Non-profit educational institution (community, religious, philanthropic)	14.71	16.13	17.86	30	12.12
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	37.5	66.67	43.48	33.33	16
Non-governmental organization (NGO) and third sector	100	0	50	16.67	0
Government or public body	20	0	0	5.26	0

(to be continued)

(concluded)

Administrative category	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Local					
Federal public educational institution	53.13	60.87	52.94	33.33	33.33
State public educational institution	53.33	36.84	66.67	10	11.54
Municipal public educational institution	50	66.67	50	0	25
For-profit private educational institution (school, training center, learning institute, etc.)	13.64	30	10.61	17.5	16.88
Non-profit educational institution (community, religious, philanthropic)	32.35	45.16	39.29	10	36.36
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	31.25	11.11	30.43	33.33	20
Non-governmental organization (NGO) and third sector	0	0	33.33	50	25
Government or public body	60	50	66.67	84.21	57.14
Cloud-based and local					
Federal public educational institution	31.25	26.09	5.88	33.33	15.69
State public educational institution	33.33	21.05	33.33	50	23.08
Municipal public educational institution	0	33.33	50	0	25
For-profit private educational institution (school, training center, learning institute, etc.)	50	32.5	33.33	20	27.27
Non-profit educational institution (community, religious, philanthropic)	47.06	32.26	39.29	40	28.79
“S System” institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	18.75	22.22	13.04	8.33	0
Non-governmental organization (NGO) and third sector	0	0	16.67	33.33	0
Government or public body	20	25	33.33	10.53	4.76

Table 6.12 – Content presentation tools, by type of course

	Corporate (%)	Non-corporate (%)	Blended (%)	Accredited full distance learning (%)	On-site (%)
Teleclasses	10.58	10.53	13.95	14	5.86
Accessible resources	8.65	11.18	15.5	16.67	8.79
Video games	11.54	15.79	18.6	18	8.79
Online simulations	22.12	22.37	22.48	28	10.99
Printouts other than books	15.38	17.76	34.88	36	43.96
Audio	30.77	36.84	40.31	40	17.58
Physical books	7.69	13.82	46.51	50	44.69
Digital learning objects	49.04	46.05	45.74	52.67	18.68
E-books	33.65	42.76	53.49	57.33	27.47
Varied videos (other than teleclasses)	57.69	65.79	68.22	72.67	39.93
Digital texts other than books	66.35	76.97	75.97	80	47.99

Table 6.13 – Content distribution tools, by type of course

Content distribution tool	Corporate (%)	Non-corporate (%)	Blended (%)	Full distance learning (%)	On-site (%)
Wikimedia Foundation channels (Wikiversity, Wikipedia, Wikimedia Commons, etc.)	0.96	0.66	3.88	4.67	4.03
Blogs	5.77	9.87	10.08	14	8.79
Virtual drives (Google Drive, Dropbox etc.)	6.73	9.87	16.28	15.33	12.82
Chat groups (WhatsApp, Telegram etc.)	14.42	13.16	25.58	24.67	18.68
Social network groups (Facebook, Google+ etc.)	16.35	14.47	27.91	31.33	24.54
Email, email listings or groups	37.5	41.45	52.71	50	49.08
Learning management system	83.65	90.79	89.92	94	50.92

Table 6.14 – Content repositories, by type of course

Repository	Corporate (%)	Non-corporate (%)	Blended (%)	Full distance learning (%)	On-site (%)
None	19.23	19.08	6.2	2.67	7.69
Content from several suppliers, with no centralized research repository	8.65	9.21	7.75	12.67	7.33
Online encyclopedia	10.58	13.16	21.71	24.67	15.02

(to be continued)

(concluded)

Repository	Corporate (%)	Non-corporate (%)	Blended (%)	Full distance learning (%)	On-site (%)
Institution's repository (aggregates contents from external suppliers)	21.15	18.42	14.73	25.33	16.12
Other	21.15	18.42	14.73	25.33	16.12
Repository of open educational resources	15.38	27.63	31.01	34	17.95
Digital repositories with contents by the institution	44.23	48.68	58.91	64	34.43
Physical library	14.42	23.68	68.99	66	58.97

Table 6.15 – External means to the learning management system used for communication and support of students, by type of course and administrative category

Email, email listings or groups	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	81.25	95.65	0	50	45.1
State public educational institution	66.67	63.16	0	60	53.85
Municipal public educational institution	100	33.33	0	100	75
For-profit private educational institution (school, training center, learning institute, etc.)	86.36	80	0	70	75.32
Non-profit educational institution (community, religious, philanthropic)	88.24	90.32	0	80	77.27
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	81.25	88.89	0	58.33	48
Non-governmental organization (NGO) and third sector	100	0	0	83.33	50
Government or public body	100	75	0	73.68	71.43
Social networks	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	53.13	30.43	23.53	33.33	35.29
State public educational institution	53.33	52.63	83.33	20	46.15
Municipal public educational institution	50	0	0	0	25
For-profit private educational institution (school, training center, learning institute, etc.)	40.91	47.5	43.94	17.5	32.47

(to be continued)

Non-profit educational institution (community, religious, philanthropic)	44.12	38.71	35.71	20	51.52
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	18.75	33.33	30.43	16.67	36
Non-governmental organization (NGO) and third sector	100	0	66.67	33.33	0
Government or public body	80	25	33.33	15.79	14.29
External groups	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	9.38	26.09	17.65	16.67	9.8
State public educational institution	0	5.26	0	20	3.85
Municipal public educational institution	0	33.33	0	100	0
For-profit private educational institution (school, training center, learning institute, etc.)	29.55	25	19.7	15	11.69
Non-profit educational institution (community, religious, philanthropic)	14.71	12.9	10.71	10	16.67
"S System" institution (Senai, Sesi, Senac, Sesc, Senat, Sebrae, etc.)	0	11.11	4.35	8.33	4
Non-governmental organization (NGO) and third sector	0	0	16.67	16.67	0
Government or public body	20	25	0	10.53	4.76
Videoconferencing tools (like Skype, Hangouts do Google, WebEx, etc.)	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	50	60.87	35.29	16.67	11.76
State public educational institution	40	26.32	66.67	10	11.54
Municipal public educational institution	0	33.33	0	0	0
For-profit private educational institution (school, training center, learning institute, etc.)	29.55	12.5	33.33	12.5	16.88
Non-profit educational institution (community, religious, philanthropic)	41.18	29.03	28.57	30	12.12

(continued)

"S System" institution (Senai. Sesi. Senac. Sesc. Senat. Sebrae. etc.)	0	22.22	13.04	8.33	4
Non-governmental organization (NGO) and third sector	0	0	33.33	33.33	25
Government or public body	40	25	16.67	5.26	4.76
Chat (Whatsapp. Telegram. Google Talk. etc.)	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	46.88	65.22	41.18	16.67	13.73
State public educational institution	40	36.84	83.33	0	26.92
Municipal public educational institution	0	33.33	0	100	25
For-profit private educational institution (school. training center. learning institute. etc.)	54.55	30	27.27	35	22.08
Non-profit educational institution (community. religious. philanthropic)	35.29	32.26	25	10	22.73
"S System" institution (Senai. Sesi. Senac. Sesc. Senat. Sebrae. etc.)	18.75	33.33	13.04	25	4
Non-governmental organization (NGO) and third sector	0	0	16.67	16.67	0
Government or public body	40	25	33.33	5.26	14.29
SMS	Full distance learning (%)	Blended (%)	Non-corporate (%)	Corporate (%)	On-site (%)
Federal public educational institution	12.5	21.74	5.88	16.67	5.88
State public educational institution	0	26.32	0	10	11.54
Municipal public educational institution	50	0	0	0	0
For-profit private educational institution (school. training center. learning institute. etc.)	47.73	27.5	15.15	10	33.77
Non-profit educational institution (community. religious. philanthropic)	23.53	22.58	14.29	0	28.79
"S System" institution (Senai. Sesi. Senac. Sesc. Senat. Sebrae. etc.)	12.5	44.44	17.39	8.33	8

Non-governmental organization (NGO) and third sector	0	0	50	16.67	25
Government or public body	20	25	16.67	15.79	4.76

Part 7 – Profile of supplying institutions

Table 7.1 – Regions of origin of supplying companies and institutions

Region	No. of establishments
Central-West	9
Northeast	6
North	2
Southeast	40
South	12

Table 7.2 – States of origin of supplying companies and institutions

State	No. of establishments
SP	22
RJ	11
DF	8
MG	7
SC	5
RS	4
PR	3
PE	2
SE	2
MS	1
PB	1
RN	1
RO	1
RR	1
Total	69

Table 7.3 – Size of supplying companies and institutions

Size	No. of establishments
Large business	24
Medium business	5
Small business	12
Micro business	27
Not available	1

Table 7.4 – Main activity of supplying institutions participating in the 2015 Brazilian Census for Distance Learning

Main activity	No. of institutions
Publishing (production of printed or digital text and/or multimedia)	47
Information technology (software)	12
Audiovisual production, information technology (software), advertising agency, educational content	7
Information technology (hardware)	4
Print/publishing (production of printed or digital text and/or multimedia), audiovisual production	3
Education	2
Hosting/cloud computing	2
Instructional design	1
Teaching	1
Teaching methodology (adults)	1
Third sector	1
University (UAB)	1
Practice labs	1
Education system production	1

Table 7.5 – Services provided by supplying companies and institutions participating in the Census, in absolute numbers

Service	No. of establishments
Supply of educational materials (books, video, audio, etc.)	54
Customization of educational materials (books, video, audio, etc.) supplied by third parties	54
Supply of full distance learning courses	54
Training	41
Consulting	32
Systems maintenance	31
Software development	21
Software deployment	17
Equipment maintenance	4
Content marketing	1
Professional training	1
Handouts for quick distance learning courses	1

Table 7.6 – Importance of distance learning in the income of supplying companies and institutions

Importance	No. of establishments
Low (less than 25% of total income)	11
Medium (26%-50% of total income)	7
High (51%-75% of total income)	9
Very high (76%-100% of total income)	30
Not available	12

Table 7.7 – Source of income of supplying companies and institutions

Source of income	No. of establishments
No public funding	31
Tenders	12
Public funding	6
Fies/Pronatec	2
BNDES loans	2
Private investments	2
Not available	12

Table 7.8 – Clients served by supplying companies and institutions

Client administrative category	No. of institutions
For-profit private educational institution	40
"S System" institution	19
Government or public body	18
Federal public educational institution	13
Non-profit educational institution (community, religious, philanthropic)	12
State public educational institution	18
Third sector	9
Private companies	7
State public educational institution	6
Non-governmental organization (NGO)	5
Municipal public educational institution	5
The institution's employees/ students	3
Co-op	1

Table 7.9 – Licensing practiced by supplying companies and institutions

Type of licensing	No. of establishments
Standard copyright (all rights reserved)	28
Copyright fully assigned to the content buyer	20
No copyright materials produced	16
Open licensing (Creative Commons Attribution, CC-BY; Creative Commons Attribution-ShareAlike, CC-BY-AS etc.)	6
Not available	25

Table 7.10 – Software licensing practiced by supplying companies and institutions

Type of licensing	No. of establishments
Standard copyright (all rights reserved)	24
GNU General Public License (GPL), INPI, SaaS, GNU Library, Lesser General PublicLicense (LGPL)	9



