

# ECONOMIC AND LEGAL ANALYSIS OF SCHOLARSHIPS IN THE UNIVERSITY OF SAN FRANCISCO XAVIER DE CHUQUISACA (2014-2024)

## ANÁLISIS ECONÓMICO - JURIDICO SOBRE BECAS UNIVERSITARIAS OTORGADAS POR LA UNIVERSIDAD SAN FRANCISCO XAVIER DE CHUQUISACA (2014 - 2024)

### **Raquel Arancibia Padilla**

arancibia.raquel@usfx.bo

<https://orcid.org/0000-0003-2724-8463>

Universidad San Francisco Xavier

### **Verónica Coca Párraga**

coca.veronica@usfx.bo

<https://orcid.org/0009-0005-2251-316x>

Universidad San Francisco Xavier

### **Resumen**

El artículo resalta la importancia de las becas en la educación superior, destacando sus beneficios para los estudiantes y la sociedad al proporcionar acceso a una educación de calidad sin generar cargas financieras abrumadoras. Se menciona el programa de becas de la Universidad Mayor, Real y Pontificia de San Francisco Xavier de Chuquisaca, el cual promueve el desarrollo integral de los estudiantes. El análisis y evaluación del sistema de becas y sus fuentes de financiamiento tiene como objetivo proponer alternativas para optimizar la gestión de recursos y aumentar el número de estudiantes beneficiados, mejorando así la calidad de vida durante su formación profesional. Se abordan aspectos positivos de las becas, como la igualdad de oportunidades, la motivación académica, el impacto económico y social, la reputación institucional y la diversidad cultural e intelectual. Se destaca la importancia de abordar los desafíos actuales para maximizar el impacto de las becas en el futuro de las comunidades y sociedades.

**Palabras clave:** Sistema de becas universitarias, calidad universitaria, recursos económicos, fuentes de financiamiento, motivación académica

### **Abstract**

This article emphasizes the importance of scholarships in higher education, illustrating their benefits to students and society by providing access to quality education without creating overwhelming financial burdens. Specifically, it examines the scholarship program of the Mayor, Real y Pontificia de San Francisco Xavier de Chuquisaca, which promotes the comprehensive development of students. Through an analysis and evaluation of the scholarship system and its financing sources, the study aims to propose alternatives to optimize resource management and increase the number of beneficiary students to enhance their quality of life during professional training. The discussion highlights positive aspects of scholarships, such as equal opportunities, academic motivation, economic and social impact, institutional reputation, and cultural and intellectual diversity. The importance of addressing current challenges to maximize the impact of scholarships on the future of communities and societies is also underscored.

**Keywords:** University scholarship system, university quality, economic resources, sources of financing, academic motivation.

## Introduction

Higher education serves as a fundamental tool for the personal and professional development of individuals, as well as for the social and economic progress of communities. However, access to higher education is often limited by economic and social barriers. In this context, scholarships play a crucial role by offering students the opportunity to pursue academic training, regardless of their financial circumstances.

Scholarships provide numerous benefits for both students and society. For students, they represent an opportunity to access quality education while alleviating overwhelming financial burdens. These financial aids cover expenses related to education, such as books, food, accommodation, and transportation. Moreover, scholarships allow students to focus on their studies without the need to work full-time, which can interfere with academic performance. Scholarships also create opportunities for additional learning experiences, such as internships and study-abroad programs, which enrich students' training and career prospects.

Over the past decade, the University of Mayor, Real y Pontificia de San Francisco Xavier de Chuquisaca has experienced a gradual decrease in the number of students benefiting from university scholarships. The primary source of scholarship funding has been profits from the Cement Factory (FANCESA S.A.). This decline is a concerning trend, underscoring the need to analyze the relationship between funding and scholarship availability and propose sustainable alternatives to maintain the university's scholarship system.

Each year, the Mayor, Real y Pontificia de San Francisco Xavier de Chuquisaca University offers scholarship programs to students across various fields of study, helping them manage their economic challenges while encouraging academic excellence. Additionally, the university awards scholarships that support sports, cultural, and other extracurricular activities. These scholarships are based on quantifiable and verifiable criteria, aiming to promote academic training and foster the comprehensive development of students in higher education.

Scholarships are a powerful tool for promoting access and equity in higher education by providing financial support. To maximize their impact, it is essential to address existing challenges and strive toward creating a more inclusive and accessible education system for all. Ultimately, investing in scholarships equates to investing in the future of our communities and societies, fostering growth, innovation, and social progress.

## Methodology

This study is analytical, comparative, and evaluative. It examines 22 types of scholarships, highlighting that over the past decade, these scholarships have been updated, renamed, or, in some cases, eliminated. Relevant clarifications are provided in alignment with the management of these scholarships, ensuring their direct relevance to the study's stated objectives.

The methodology begins with a foundation of scientific and theoretical support to enhance the understanding of university scholarship systems. This includes not only an analysis of the types of scholarships, their economic and legal implications, but also an exploration of equity and access to higher education. Additionally, the study investigates the broader social impact of these scholarship programs.

## Theoretical bases

According to (Calero), the field of scholarships, helps students and the analysis of the types of return on educational investment has been a technique used by the theory of human capital in order to define the situations in which it is considered public intervention is convenient as a tool for educational quality

The scholarship system, according to (Calero), indicates that the State becomes the center of resource allocation, modeling higher education based on the setting of objectives, allocation of resources that are effective within a scholarship system in the field of higher education at the university.

According to (Álvarez, 2016), evidences education is linked to the development of human personality and this situation can affect the rights of democratic participation in such a way that decision-making can be altered; being the most effective means of promoting equality and freedom of people.

It is reasonable that (Organization for Trade Economic Cooperation and Development, 2018) points out the adoption of measures in the educational field, and particularly in higher education, as the first key policy to reduce inequalities. Measures that ensure both equal opportunities in access and the reduction of the risk of abandonment for economic reasons. For example, a broad network of university campuses can serve to bring the educational offer geographically closer to the population. Also, an adequate pricing policy for combined degree education Martí Sempere, M., Ródenas Calatayud, C., The policy of scholarships and public prices in the Spanish university system, ¿is it really effective? Education Magazine, 398. October-December 2022, pp. 135-160 Received: 09-22-2021 Accepted: 06-24-2022 138 with an effective scholarship system can alleviate the cost of tuition. And, finally, a system of additional aid to finance the expenses derived from pursuing studies (transport, accommodation, food or study materials) or to compensate for the potential lack of contribution to the family economy when dedicating time to studies, It would prevent their abandonment (J. Hernández y J.A. Perez, 2019).

In terms of Mokate (2001), the increase in the number of institutions and their geographical expansion can be understood as a strategy to ensure equality of access to the university, which is not limited to a vision of equality based on supply, but it is also associated with certain aspects of the demand, as it is recognized that the plaintiffs are in different conditions and, consequently, it is necessary to make adjustments to equalize the conditions in which the plaintiffs can access the opportunity that is offered. One of these diverse conditions is the

different locations in the territory. In this regard, Pérez Rasetti (2012) refers to the expansion of the geographical coverage of universities as “neighborhood” as universities become neighbors of young people, becoming “proximity offers”, proximity that we have made more complex, stopping us no longer only geographically, but also in terms of links (Cerezo, 2015).

However, given the importance of the allocation of scholarships and the impact on higher education, the regulatory framework that regulates their granting at the institutional level must be noted, in the present case, at the Universidad Mayor, Real y Pontificia de San Francisco Xavier de Chuquisaca.

Political Constitution of the State of February 7, 2009, establishes in its art. 92: I. Public universities are autonomous and equal in hierarchy. Autonomy consists of the free administration of its resources; the appointment of its authorities, its teaching and administrative staff; the preparation and approval of its statutes, study plans and annual budgets; and the acceptance of legacies and donations, as well as the execution of contracts, to achieve its purposes and sustain and perfect its institutes and faculties. Public universities may negotiate loans with the guarantee of their assets and resources, subject to legislative approval. II. The public universities will constitute, in the exercise of their autonomy, the Bolivian University, which will coordinate and program its purposes and functions through a central body, in accordance with a university development plan. III. Public universities will be authorized to issue academic diplomas and professional degrees valid throughout the State (Organization of American States, 2009).

Organic Statute of the Universidad Mayor, Real y Pontificia de San Francisco Xavier de Chuquisaca, dated February 24, 2010 approved with H.C.U. No. 001/2010, which determines in article art. 166., among other aspects: The university will promote the practice of culture, art and sports, providing economic resources, infrastructure and necessary materials, as part of a comprehensive program for the university community within the framework of current regulations (Universidad Mayor, Real y Pontificia de San Francisco Xavier de Chuquisaca, 2010).

Penultimate paragraph of Article 57 of Law No. 3058 determines that the beneficiaries will allocate the resources received as HDI for the sectors of education, health, roads, productive development and everything that contributes to the generation of sources of work (Ley N° 3058, 2005).

Decreto Supremo N° 961 del 18 de agosto de 2011, establece en su art. 2.I. Las Universidades Públicas podrán reconocer las siguientes categorías de becas financiadas con recursos provenientes del Impuesto Directo a los Hidrocarburos (IDH) (Bolivia, 2011):

- a. Socio-Economic Scholarships. These are aimed at encouraging the academic permanence of university students from impoverished, native indigenous and peasant sectors of Bolivian society, through the allocation of dining or food scholarships, housing or university hostel and work scholarships within the university, in order to guarantee the minimum conditions necessary for their academic performance.
- b. Academic Scholarships. These are aimed at optimizing academic quality and developing scientific research in favor of university students, through the allocation of research scholarships and scholarships for academic excellence.
- c. University Extension Scholarship. It is aimed at the university student population that carries out social interaction activities of the university with Bolivian society.

Subsection c) of Paragraph II of Article 8 of Supreme Decree No. 28223, of June 27, 2005, modified by Article 2 of Supreme Decree No. 28421, of October 21, 2005, establishes that Public Universities will use resources provided of the HDI among others, in the components of quality improvement and academic performance programs, and social interaction programs aimed mainly at vulnerable populations and with high poverty rates (Bolivia G. O., 2005).

Supreme Decree No. 3397, November 15, 2017, in the unique transitional article, establishes in an exceptional manner that Autonomous Public Universities are authorized to use IDH resources, accumulated and registered in their institutional budgets, in order to cover their obligations. in scholarships, academic desconcentration, Student Health Social Security and expenses related to the teaching-learning process (Derechoteca, 2017) .

Rectoral Resolution No. 97/2019 establishes the payment of scholarships for the 2019 administrations to the 2022 administration (97, 2019).

Rectoral Resolutions No. 12 and 286/2023 establish the payment of scholarships for the sale of registration from the 2023 administration.

Bank Cash Balance – Own Resources to compensate for resources not received from the Dividends of the Cement Factory – FANCESA S.A.

In short, scholarships are vital tools that can transform lives, promote individual and collective development, and contribute significantly to the progress of societies.

The University of San Francisco Xavier of Chuquisaca, with its system of university scholarships, has great importance both at an individual and societal level, and its granting can have multiple benefits. Below are some of the most relevant aspects, according to the University's Organic Statute:

1. Access to Education:

**Equality of Opportunities:** Scholarships allow students from different socioeconomic backgrounds to have access of a high quality education.

**Reduction of Financial Barriers:** Many families cannot afford educational expenses without a financial support. Scholarships can alleviate this burden, allowing more students to continue their education.

2. Personal and Professional Development:

**Motivation and Academic Performance:** Scholarships are often linked to academic performance and can motivate students to maintain high standards in their studies.

**Specialization and Training:** Scholarships may be offered in specific areas of study that help train professionals in high-demand fields.

3. Economic and Social Impact:

**Talent Development:** Scholarships can contribute to the development of highly qualified professionals, which can drive toward innovation and economic growth in various industries.

**Social Inclusion:** This aspect help integrate historically marginalized groups, promoting equity and social cohesion.

4. Advantages for Institutions and Countries:

**Reputation and Prestige:** Educational institutions that award scholarships often used to gain recognition and prestige, which can attract more talented students and increase international collaborations.

**Research Promotion:** Scholarships for graduate and doctoral studies can encourage research and development, contributing the advance of knowledge in other areas.

5. Cultural and Intellectual Diversity:

**Fostering Diversity:** Scholarships for students from different countries and cultures can enrich academic environment and promote intercultural understanding.

**Exchange of Ideas:** Scholarship recipients often bring unique perspectives and exchange of ideas that can be beneficial to the entire educational community.

*Economical and legal analysis*

To carry out the respective economic and legal analysis, the following table shows the types of scholarships that the university initially assigned to students with the evolution in the number of benefited students:

**Board 1 evolution by type of scholarship**

N°	Type of scholarship	Number of Beneficiaries									
		2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
1	Socioeconomic	0	0	0	0	0	0	0	898	747	674
2	Food	2271	1386	1960	1652	1577	1464	1194	0	0	0
3	Food Qhara Punku	7	0	0	0	0	0	0	0	0	0
4	"La Barranca" Residence	0	0	2	0	0	1	0	0	0	0
5	Teaching Assistants	584	571	1050	1087	1100	861	954	806	565	1017
6	Ayllus, Markas and Guaranies	14	4	0	6	8	11	8	0	0	0
7	Culture	77	57	53	48	61	38	26	28	36	29
8	Sports		40	60	33	25	1	0	9	16	18
9	Study for Academic Excellence	117	75	99	86	77	112	90	168	103	111
10	Laboratory Assistant	0	0	0	0	0	0	0	53	47	30
11	Rural Community Interaction	48	0	0	0	0	0	0	0	0	0
12	Urban Interaction	199	0	0	0	0	0	0	0	0	0
13	Social Interaction and University Extension	0	0	62	61	53	200	136	149	183	201
14	Health Area Internship	1327	977	862	942	905	947	742	1623	1412	1223
15	Mandatory Rural Service Scouting	0	0	0	0	0	0	353	0	0	0
16	Other Career Internship	568	325	370	362	333	295	32	343	309	266
17	Research	250	225	199	106	79	57	55	44	42	51
18	Internship	315	44	328	212	289	400	172	359	274	330
19	Mandatory Rural Service	0	0	0	0	0	94	0	0	0	0
20	Clinical Practices	0	319	307	285	299	282	0	0	0	0
21	Work Permanent Secretaries (FUL Student Leadership and Student Centers)	84	40	69	84	81	69	64	73	9	52
22	Housing	32	43	28	8	6	14	14	0	0	0
<b>Total</b>		<b>5893</b>	<b>4106</b>	<b>5449</b>	<b>4972</b>	<b>4893</b>	<b>4846</b>	<b>3840</b>	<b>4553</b>	<b>3743</b>	<b>4002</b>

**Source:** scholarships reports OF. DAF N° 249 and Memoria Anual Becas Presupuestadas (DAF-USFX, 2024)

According to the Student Welfare Division, an administrative unit dependent on the Vice-Rector's Office of the University, between the 2014 and 2023 administrations, there were 22 types of scholarships, in which students could access through the issuance of annual calls, which were reformulated, considering the social and economic relevance of the students, and there are currently 12 types of scholarships, which respond to institutional support, such as the university, which has as purpose to contribute to the social responsibility of the country. 12 scholarships currently are managed by the university, only 3 types of scholarships are the most in demand and they have the greatest relevance and justification for expenditure. These scholarships are food, boarding and assistance, which should be the most notable.

In relation to Table No. 1 Evolution by type of scholarship, it presents information on the number of scholarship recipients by type of scholarship in the years 2014-2023, in which several trends and patterns can be identified in the data:

1. The most common scholarship in terms of number of scholarship recipients is the Alimentaria scholarship, with a considerable number of scholarship recipients in most years. However, a decrease is observed in the number of scholarship recipients in this category starting in 2018.
2. Other scholarships that also have a significant number of scholarship recipients in some years are Teaching Assistants, Health Area Internship, Internship and Research. These scholarships seem to be popular among students.

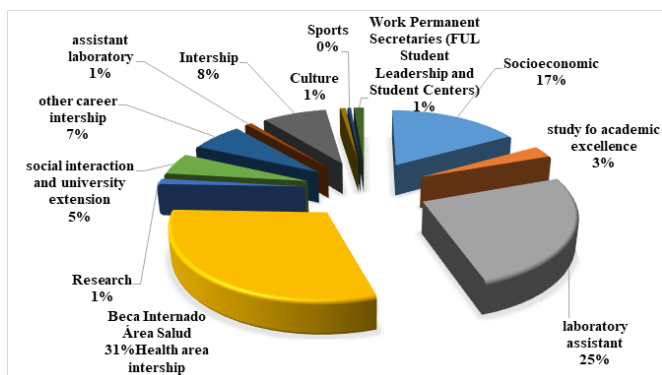
- Some scholarships, such as Socioeconomic, Residencia "La Barranca", Laboratory Assistant, Rural Community Interaction, Urban Interaction, Housing and Mandatory Rural Service, have a low or no number of scholarship recipients in several years.
- In general, some variability is observed in the number of scholarship recipients by scholarship type over the years, suggesting changes in student demand and preferences.

In summary, the table provides detailed information on the distribution of scholarship recipients by scholarship type over a decade, which could be useful in identifying areas of student interest and needs in terms of financial support and academic development opportunities.

**Results and discusión**

The reports of Social Welfare Unit and the economic-financial reports of the university's scholarship system have made it possible to visualize the impact of the relationship of the types of scholarships that it has been granting in the last ten years with the budget allocation with different financial sources, with the aim of improving and stabilizing the permanence and academic quality of students, who aspire to achieve and obtain a profession.

**Graphic 1 Scholarship Allocation**



Source: Scholarship reports OF. DAF N° 249 and Memoria Anual Becas Presupuestadas (DAF-USFX, 2024)

To analyze the percentage of scholarship allocation by funding source, the data provided must be carefully observed. Four categories of financing have been provided: FANCESA, Own Resources, IDH Source and Others. Below is the analysis of the scholarship allocation percentages corresponding to each funding source:

- FANCESA: It represents 0.1% of the scholarships assigned in the first case, 0% in the following cases and 46.8% in the fourth case.
- Own Resources: No scholarships financed with own resources were assigned in any of the situations.
- IDH Source: Scholarships financed by the IDH Source were assigned in the first case, the second and the third case.
- Others: Scholarships financed from other sources were assigned in the third case.

Different funding sources, with the IDH Source being the one that most participates in the allocation of scholarships in some cases. On the other hand, Own Resources and FANCESA have a low participation in the allocation of scholarships compared to the IDH Source.

It is important to note that the distribution of scholarships by funding source can be influenced by various factors, such as the educational institution's scholarship policies, student needs, and available funding sources. Therefore, it is crucial to conduct a more detailed analysis to better understand the factors that influence the allocation of scholarships and ensure fairness and transparency in the process.

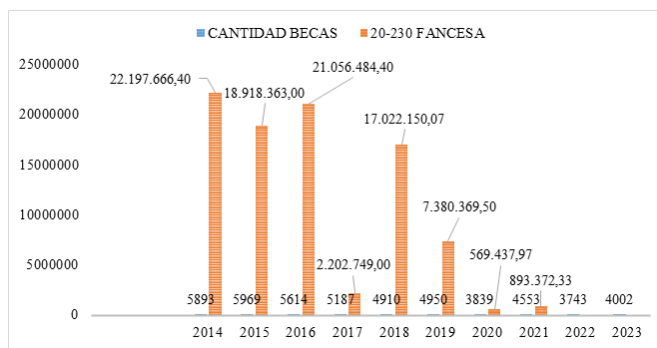
The illustration shows 12 types of scholarships that San Francisco Xavier University currently grants to students; Of which, 3 types of scholarships stand out: research scholarship, teaching assistantship and socioeconomic scholarship.

The research scholarship promotes the development of scientific research, in which the student must develop research as a graduation modality, where the monthly reports and progress that he presents represent a guarantee and justification of the scholarship that he receives month after month.

The teaching assistant scholarship strengthens academic training, in which students contribute to subjects with a practical component, which is also awarded to students who undergo a merit contest and competency exam to be eligible for these scholarships on an annual basis.

The socioeconomic scholarships strengthen the academic training of students who do not have adequate economic conditions, that is, the Social Welfare unit of the university carries out an evaluation of the family environment of these students who apply for this type of scholarships, being that families with Low-income levels are considered eligible for this scholarship.

**Graphic 2 resources allocated by type of scholarship**



Source: Scholarship reports OF. DAF N° 249 and Memoria Anual Becas Presupuestadas (DAF-USFX, 2024)

The table above initially shows the relationship between the annual decrease in scholarships and the gradual reduction of resources allocated to the granting of university scholarships financed by FANCESA. It can be seen that, starting in 2022, the university stops receiving financial resources from FANCESA profits. As a result, the university must manage its own resources to cover this demand, which has a negative effect on both the reduction in the number of university scholarships and the decrease in financial resources allocated for this purpose.

Likewise, the evolution of the number of scholarships by funding source in the last 10 years is shown, showing a reduction from 27 million to 9 million in 2022. However, in 2023 there is an increase of 6% in the number of scholarships assigned, equivalent to 31% of the total assigned budget. Although there was no significant increase in the number of scholarships, an increase is observed in the value assigned to each type of scholarship.

**Board 2 relationship of number of scholarships by source of funding**

YEAR	AMONG	20-230	20-230	41-119	41-119	41-113	TOTAL GENERAL
		FANCESA	RESOURCES S/G RES. RECT. 97/2019	IDH S/G DS 3397	IDH S/G DS 961	COP. TRIBUTARIA	
			S/G RES. RECT. 12 y 286/2023				
2014	5893	22.197.666,40			4.815.648,00		27.013.314,40
2015	5969	18.918.363,00			9.639.704,00		28.558.067,00
2016	5614	21.056.484,40			3.617.500,00		24.673.984,40
2017	5187	2.202.749,00		22.197.866,00			24.400.615,00
2018	4910	17.022.150,07		3.884.253,43	2.511.239,00		23.417.642,50
2019	4950	7.380.369,50	6.895.423,04		3.231.011,64		17.506.804,18
2020	3839	569.437,97	2.471.498,06		1.587.439,54		4.628.375,57
2021	4553	893.372,33	11.451.101,07		2.495.949,95		14.840.423,35
2022	3743		5.170.630,33		1.956.362,85	2.782.767,65	9.909.760,83
2023	4002		7.266.265,45		2.625.395,01	3.116.370,19	13.008.030,65

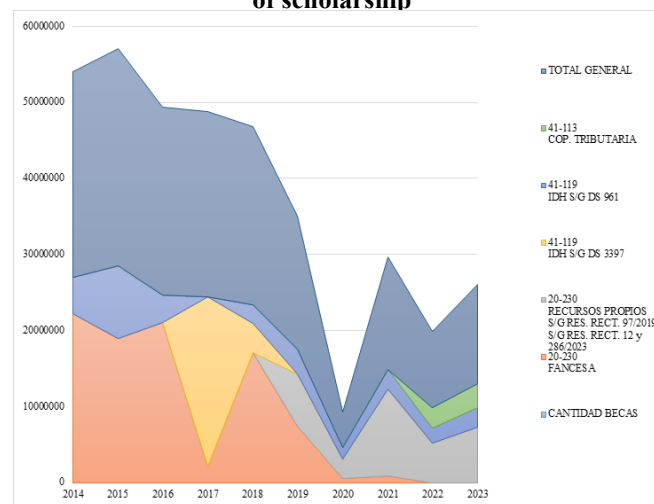
**Source:** Own elaboration, with reports provided by the Office of wellness University and the office of finances of the USFX – Becas Ejecutadas (Presupuestos, 2024)

As it can be seen in the table above, there is a decrease in the number of scholarship recipients, as well as a decrease in financial resources, which prompted the university to better manage the processes and procedures for granting scholarships. From 2014 to 2021, a large percentage of the resources came from dividends received by FANCESA; from 2019, the factory began to generate less profits, which caused the university to receive a lower percentage of resources since that management, this situation has caused the need to seek alternative financing to alleviate the situation, in order to comply what is established in the University Statute, to be an institution that offers superior education to perform professionals.

Likewise, it is necessary to mention that the university carries out ex ante and ex post evaluation of the scholarships awarded, and in order to validate, verify and check that said resources are effectively used according to the objective of each of the

scholarships offered by the university, some irregularities were detected in the selection and execution processes, which prompted the University, through the Social Welfare Unit, to comply with regulations more strictly and award scholarships to students who really need and become an economical support in their professional training, it has been considered as some of the reasons that cause a decrease in both the number of students and the financial resources received.

**Graphic 3 canceled resources by funding source and type of scholarship**



**Source:** Own elaboration, according to information provided by the university (Presupuestos, 2024)

According to the information provided, the canceled scholarship resources are presented by type of financing source. The distribution of canceled scholarship resources by funding source is detailed below:

1. FANCESA's own resources: 20-230 (20,230 scholarships cancelled)
2. Resources from governing resolutions 97/2019 and 12 and 286/2023: 20-230 (20,230 scholarships cancelled).
3. HDI without support of Supreme Decree 3397: 41-119 (41,119 scholarships canceled)
4. HDI without support from Supreme Decree 961: 41-119 (41,119 scholarships cancelled)

Tax sharing: 41-113 (41,113 scholarships cancelled)

In total, 187,957,017.88 million bolivianos corresponding to scholarships were canceled, distributed as follows:

1. FANCESA's own resources: 90,240,592.68 million bolivianos.
2. Resources from governing resolutions 97/2019 and 12 and 286/2023: 33,254,917.95 million bolivianos.
3. HDI without support of Supreme Decree 3397: 26,082,119.43 million bolivianos.
4. HDI without support of Supreme Decree 961: 32,480,249.99 million bolivianos.
5. Tax sharing: 5,899,137.84 million bolivianos.

This analysis allows you to visualize the distribution of canceled scholarship resources by type of funding source, which can help identify areas for improvement in the management and administration of scholarships, as well as possible opportunities to optimize the allocation of resources in the future. , considering that they were decreasing each year, considering a worrying aspect for the University, since an early projection of resources destined to pay scholarships is alarming, because this process can be affected, with students being the most vulnerable sector, and The objective is to analyze alternatives that compensate or replace this scenario.

### Conclusions and Reflexions

Based on the analysis carried out on the allocation of university scholarships between 2014 and 2023, it can be concluded that there is a significant fluctuation in the university's scholarship system, with changes in types of scholarships, availability and financial resources allocated to their financing. It is essential to rethink institutional objectives and review the scholarship system to ensure continuous financial support for students, prioritizing both the type of scholarships and the sustainable management of resources. This adaptation of policies is necessary to guarantee equitable and sustainable access to higher education, in line with the mission of training conscious professionals committed to sustainable development and research.

The university must adjust to regulatory, educational and current changes to fulfill its purpose of providing educational opportunities to all who need it, considering the following trends:

1. The variation in scholarship allocation from year to year, with peaks in 2015, 2016, and 2017, and a decline in 2020. This may be due to various factors, such as changes in demand for scholarships, availability of financial resources, and scholarship allocation policies.
2. A significant increase in resources allocated to scholarships over the years, indicating a growing commitment of educational and government institutions to supporting the higher education of needy students.
3. Diversity of sources of financing for the scholarships, including the University's own resources, taxes, and other funds determined with rector and H.C.U. relations, demonstrating the importance of a sustainable establishing and diversified financing mechanisms to guarantee the continuity of the scholarships over time.

In general, data has been presented have shown a commitment to allocating university scholarships as a tool to promote equity in higher education. However, it is important to continue evaluating and improving scholarship allocation processes to ensure that they reach students who truly need them and that they contribute effectively to their academic success.

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