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Compensatory Policies in Europe.

Some lessons for Mexico ?

For a comparative work on the equity of education in Europe for the European Commission (GERESE, 2005) , I proposed a canvass of equity according to which an educational system is more equitable than another if :

- 1) Equality of opportunity is greater. In Rawls's theory, « fair equality of opportunity » is the second principle of justice. An (imperfect) indicator of inequality of opportunity is the effect of social origin on PISA scores, *which can be measured either by the slope of the regression line of the performance on an indicator of the student's social environment or by the variance of the performance which is explained by the social environment of the student.*
- 2) Weakest students are less weak ; This criteria is grounded on the idea that modern societies have a lot of advantages, which come at a cost, which is that they require more complex skills. Therefore, equity requires that education system should deliver to all students a level of skills which allow them to participate actively to this society¹. *Indicators for this criteria may be the % of pupils under level 2 in the PISA evaluation, or the level of the first decile of the students' scores in PISA.*
- 3) The gap between the best and the weakest students is smaller. This criteria is grounded on the idea which is expressed by Rawls in the preface of the French edition of the Theory of justice (Rawls, 1988) : In an equitable society, there is « a large dispersion of the human capital ». This large dispersion occurs when, at the end of their schooling period, the gap between the weakest and the strongest students is minimum. This same gap in PISA is a default estimate of it. An indicator may be the standard deviation of the scores.

Are compensatory policies adapted to this challenge ? Let us define these policies as « a reinforcement of resources in disadvantaged educational contexts ». They appeared when it became clear that Comprehensive school as such was not enough to assure equality among the students of different social backgrounds.

The first country to implement such policy was the US, in the sixties. Many European countries followed So, the first characteristics of compensatory policies in Europe is that almost all European countries implemented a form or another of these policies, first in the

¹ It is also grounded on the Rawlsian third principle of justice, the « Principle of difference »- which says that inequalities in a fair society have to be at the advantage of the less favored people. What has to be at their advantage is the distribution of« Primary Social Goods» (liberties, income, power and the social bases of self respect) ; education is not a Primary Social Good, but I apply it however to Education because education enhances the probability for anyone to have access to any of these goods.

United Kingdom (1967), then, later, in the eighties, in continental Europe : France (1982), Portugal (1987), Belgium (1989), Sweden (1989), Greece, and many others, often with the support of the European Commission.

The second thing to note is that these policies differ.

They differ from one country to another. They may target some students in a school, schools as a whole or areas including several schools. Eligible schools are most of the time chosen by a set of social and educational indicators, but the indicators differ. Always, the policy means supplementary resources, but the quantity of this supplement vary and also how they can be used. In France, in Belgium, to be part of the policy, eligible schools propose to the administration a « project » on how they will use the extra resources , but in other programs the content of the policy is defined in a more centralized way. They may target a different proportion of the whole student population. Also, in some countries (e.g. UK), the regulation of the policy is strong, while in others (e.g. France) it is weak (Meuret et al., 2014) : Priority schools are asked to mobilize but administrative pressure to succeed and help to face problems when they occur are rather weaker for them than for other schools.

They also differ with time. In most countries, the policy took several successive forms, of which the acronyms show a great administrative creativity. For instance in the UK, EPA (Education Priority Area) disappeared at the end of the seventies but new forms of compensatory policies were designed and implemented by the New Labour government in the nineties : EAZ (Education Action Zones), then « Excellence in the Cities » (1999). In Portugal, the initial PIPSE program was replaced by PEPT in 1991, then by TEIP and by a new TEIP in 2005.

Some of these changes tried to address some drawbacks of the policy. For instance, in France in 2006, the ZEP were replaced by RAR (Réseaux Ambition Réussite) for schools in the poorest areas and RRS (Réseaux de réussite scolaire) for less difficult situations. It was intended to address the problem of a scatter of resources over a too great number of schools : RAR were a kind of super ZEP, with more additional resources than the in the ZEP. Then, in 2014, the RAR/RRS disappeared and were replaced by REP (Réseaux d'Education Prioritaire) and REP+ (for the most difficult environment). This did not hinder the number of students concerned by Compensatory Policies to increase. In 1982, 8% of students in primary schools, 10% in middle schools were subject to Compensatory Policies, while, in 2014, they were 18% in primary schools and 20% in middle schools. In France too, since 2017, a drastic reduction of class size has been added to the other compensatory actions in REP+, because this reduction, however costly, was backed by evidence, which was not the case for many actions in the REP. This reduction of class size was welcomed by the teachers, even if it was a move towards a more directive and centralized form of the policy.

Other changes reflect an evolution of the problems and the priorities of the school systems. In recent years, in most European countries, the question of migrant students, of asylum seekers (Sweden), of violence and bullying in schools, have become more important.

Whatever these changes and these differences, it is possible to make a list of actions frequently associated with Compensatory policies :

- Support of different kinds for struggling students, for minority students (e.g. Roms in the Czech Republic), for immigrant students (e.g. Sweden).

- Bonuses and faster careers for teachers who teach in priority area (in France, about 1000€per year).
- Partnerships with local administrations to implement various forms of support for children after school or other actions, sometimes accused to distract the schools from teaching.
- More teachers per pupil (about 15% in France), more non-teaching staff, and smaller class size (in France about 2 students less, until the recent reduction to 12 pupils per class in the early years in REP+)
- Adaptation of the curriculum to the students (in Sweden, courses in the language of origin of immigrants students or alternative curriculum in small classes for students with severe learning difficulties)
- Improving readiness for school by actions on young children (The development of pre-elementary schools and the « Sure start program » in the UK, breakfast at school in Portugal)
- Actions to improve the involvement of parents in the life of the school or in the monitoring of their children learning.
- Cultural awakening (e.g. Belgium), a controversial policy, opponents arguing that it results in less time for teaching.

After this brief description of what Compensatory policies are, we have to ask if they work, that is if they achieve their goal to close the gap between the achievement of students in and outside priority schools.

Of course achievement may be understood in various ways (in Belgium, for instance the policy has the long term goal of « assuring equal opportunity of social emancipation »), but it follows from the very nature of the school system that the knowledges and skills acquired by the students are likely to be the best way to assess the achievement of the policy.

The most frequent adjective used, in all European countries, to describe the effects of the Compensatory Policies is « disappointing ». This judgement is most of the time grounded on approximative evidences, which allow supporters of the policy to claim that «true, results did not improve, but the local conditions deteriorated, so we may consider that it is a success », this being said most of the time without bringing any evidence of this deterioration.

Unhappily, the rare rigorous evaluations of Compensatory policies confirm, with one exception we will address, this disappointing feeling. I am aware of three rigorous evaluations in France, all three on middle schools, and one in England.

In France, Meuret (1994) used data from a cohort of students during their first two years in middle school, 9/89 to 6/91) both in and out ZEP. He showed that, ten years after the beginning of the policy, under control of their social origin and their initial achievement in Mathematics and French, ZEP students progressed *a little less* than « out ZEP » students, while the goal of the policy was that this controlled progression should at least be the same in both kinds of schools. He showed also that the gap between advantaged and disadvantaged students, and between weak and strong students. increased *more* in ZEP schools than in out ZEP schools. So being in a ZEP school was (a little) detrimental to the students, and especially detrimental for weak or poor students. Beyond these global result, however, the

study showed that, in a few ZEP middle schools, students performed better than expected, but it was unable to understand why. However, this study assessed the effect of being in a ZEP school, not really the effects of the ZEP policy : It was arguable that, without the ZEP policy , the gap between « ZEP » schools and others would have been greater because it was the reflect of a more difficult social context for the ZEP schools.

Unhappily, a second study (Benabou and al., 2004) excluded this possibility. To control for the social context of the schools, they used a « difference in difference approach », measuring if the gap of achievement between the Non ZEP and the ZEP schools was smaller after the implementation of the policy (in 1992) than the gap between the same schools before the policy (1981). The answer was : no, for all the criteria used in the study (probability of leaving school without a diploma, orientation in more prestigious tracks, probability to have the Bac at the end of secondary schooling). The authors propose some explanations for this failure, including (1) a stigma of the ZEP label, discouraging the best teachers to apply for these schools, (2) too much resources devoted to the bonuses for the teachers and not enough going directly to the students and (3) not enough extra resources because they had to be shared between too much ZEP schools.

To address this last problem, the ministry created, as we saw, the RAR, which were less numerous than the ZEP and received significantly more extra resources. The RAR policy was evaluated by Davezies and Buffy (2013). They used a « regression discontinuity design » to address a problem which remained with the Benabou method, the possibility of a worse evolution of the context in the ZEP than outside them. The criteria was the marks in French and Maths at the final examination of middle schools (Brevet). No significant effect was observed on the marks, while the study confirmed the stigma effect : increasing proportion of beginning teachers and decrease of the number of students in the RAR schools.

However, one form of Compensatory Policy was shown, through a rigorous study, to be effective: The Excellence in the Cities program of the New Labour government in the UK.

This program deals with middle schools located in disadvantaged areas. It is highly centralized, the middle schools which receive the additional resources having to use them for three actions only : (1) each student has a « learning mentor » who helps him or her to treat any problem he or she meets, be it in learning or in living (2) « Learning Support Units » provide support for highly difficult and disturbing students and (3) a « Gifted and Talented Program » provides deeper learning opportunities to the best students of the school.

Machin and al., 2007 used a difference in difference approach to evaluate this policy and observe a positive and significative effect of the entry in EiC program 1)on the attendance of the students and 2)on their performances at the 14 year test. They conclude a true causal impact of EiC on Maths – not on English- performance and on attendance. Moreover the effect of the policy was stronger in the most disadvantaged schools and for high ability students, which suggest that the « Gifted and Talented » program had an especially strong effect.

Should we recommend compensatory policy in Mexico ?

My answer would be : no.

First, because of the disappointing results of these policies in Europe, although it has to be noted that rigorous evaluations show a null effect of these policies and not a negative one, as some previous policies for weak students had, e.g. the establishment of special classes or tracks for them.

Second, because a (too fast) look at the results of Mexican students in PISA tends- if I read well- to show that the main problem in Mexican school is not social inequalities,

Using the science performance in PISA 2015, I looked at the position of Mexico, compared to the OCDE average and to France. The result is as follows².

A quick look at the equity of the Basic Education in Mexico from PISA 2015 ³			
	Mexico	OCDE average	France
Mean, science	416	493	495
Adjusted mean in science after accounting for per capita GDP	452	493	495
Part of science performance explained by Socio Economic Status	11 %	13%	20%
% of students below PISA level 2 in the three PISA domains (reading, math and science).	36%	13% ⁴	15%
First decile ⁵ , science	325	368	355
Standard Deviation, science	71	100	102

This table suggests that the more inequitable characteristics of the Mexico school system is the high proportion of students who are very weak in the three PISA domains (reading, math, science). This has of course a negative effect on the mean performance of the students, which is 43 points lower than the OCDE one, even after accounting for the wealth of the country.

One policy may suit, to my eyes, the case of Mexico. Interestingly, this policy which had positive effects on weak and disadvantaged pupils target all pupils in the country and not only disadvantaged kids.

This policy is the « Literacy hour » in English primary schools, which started in 1997, after an experimentation in 1996.

All primary schools were given some additional resources (more in disadvantaged area) and teachers were required to teach reading one hour per day according to a fixed canvass : 15' of « shared text work » (students read texts together or read texts to the class), 15' of « focused word work » (spelling, decoding, grammar) in whole class, 20' of guided work in level groups, 10' of summarization (students present to others what they have learned during the hour). Best specialists in the country provided resources to the teachers (exercises, tests,

² Recall that the PISA scale of performance has an international mean of 500 and a standard deviation of 100, and that it has been calculated that, roughly, students' progress each year of 40 points on this scale.

³ Source : PISA 2015 results, vol.1, Excellence and equity in Education. (m, σ, D1 : p 323), https://www.oecd-ilibrary.org/fr/education/pisa_19963777

⁴ In PISA top country (Singapore) this percent is 5.

⁵ The first decile is the score of the best of the 10% weakest students.

advice). Initial and ongoing training, textbooks, national evaluations were made coherent with the policy. English teachers were at the beginning reluctant to such a prescriptive policy but changed their mind when they discovered that it shortened preparation time and also that the policy worked with the children.

A rigorous study investigated the policy during its experimental phase (1996-1997), when it was possible to compare the schools which had implemented the policy with a control group which had not. It showed the policy to be effective : Machin and Mc Nally (2008) observed a positive effect on the reading scores at the end of primary school. The effect was greater for weak students,- which is of interest for us here- and for boys. It was also stronger in the most disadvantaged schools. Moreover, they observed a spillover effect on math scores and also, because the cost of the policy was rather weak, that the policy was not only effective but also efficient : it had a positive benefit/cost ratio.

Why did it work while Compensatory policies, most of the times, did not ? Of course, we do not know for sure. But we may note that, compared to the Compensatory policies, this one is more centralized, more focused on learning and provide strong guidance and support to the teachers, Also, it concerns all the students and schools, which avoid the problems of thresholds and of stigma.

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