



Study supporting the evaluation of the European Disability Strategy (2010- 2020)

Final Report – Executive Summary

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Executive Summary

Introduction

In May 2019, DG Employment, Social Affairs and Inclusion, European Commission (DG EMPL) appointed ICF and the European Centre for Social Welfare Policy and Research to undertake a study supporting the evaluation of the European Disability Strategy (2010-2020).

The European Disability Strategy

The European Disability Strategy 2010-2020 (hereafter referred to as the Strategy) is a comprehensive multiannual framework with a set of objectives and actions for the implementation of the disability policy at EU level. The Strategy aims at promoting a barrier-free Europe and at empowering people with disabilities so that they can enjoy their rights and participate fully in society and economy. The Strategy 2010-2020 focuses on actions in eight priority areas:

- accessibility: make goods and services accessible to people with disabilities and promote the market of assistive devices;
- participation: ensure that people with disabilities enjoy all benefits of EU citizenship, remove barriers to equal participation in public life and leisure activities, promote the provision of quality community-based services;
- equality: combat discrimination based on disability and promote equal opportunities;
- employment: increase the participation of people with disabilities in the labour market, where they are currently under-represented;
- education and training: promote inclusive education and lifelong learning for students and pupils with disabilities;
- social protection: promote decent living conditions, combat poverty and social exclusion;
- health: promote equal access to health services and related facilities;
- external action: promote the rights of people with disabilities in the EU enlargement and international development programmes.

The implementation of the Strategy is also supported and accompanied by four general implementation instruments (Awareness raising; Financial support; Statistics, data collection and monitoring; Mechanisms required by the UN Convention).

The EU ratified the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD) in December 2010, and by 2018 all EU Member States had also ratified the Convention. The UNCRPD is a human rights instrument with an explicit social development dimension. It adopts a broad categorization of persons with disabilities and reaffirms that all persons with all types of disabilities must enjoy all human rights and fundamental freedoms. The Strategy is the tool for the implementation of the UNCRPD at EU level.

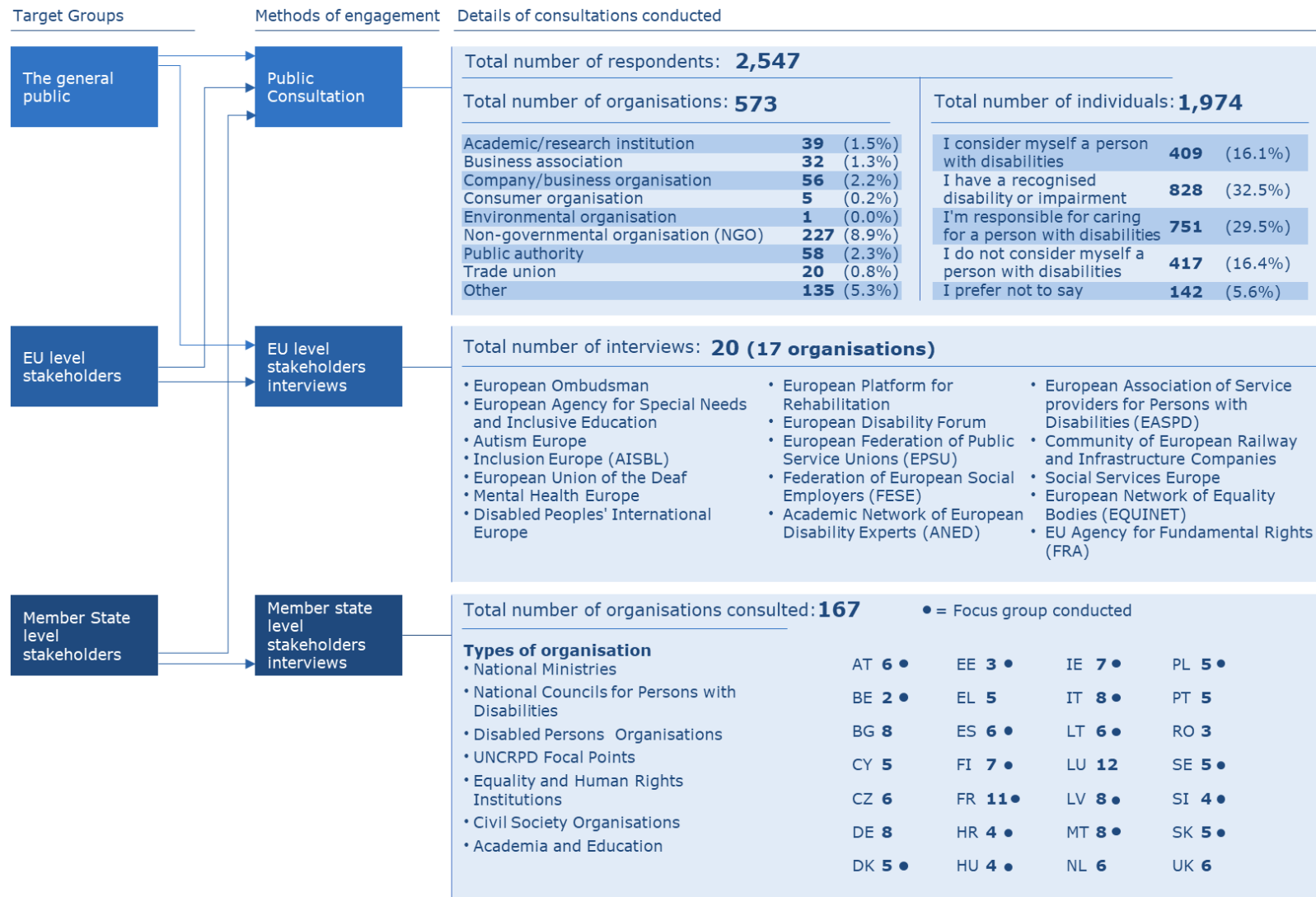
The Strategy was accompanied by Commission Staff Working Document SEC (2010) 1323¹, which reflected outcomes of the previous EU Disability Action Plan 2003 – 2010. This directly informed actions included in the EU Disability Strategy 2010-2020. In addition, an initial plan to implement the Strategy with a concrete list of actions for 2010 to 2015 was published.²

Purpose of the study

The purpose of this study is to review the implementation of the Strategy and to formulate possible priorities and actions for future EU policy development.

The study methodology consisted of EU and Member State level research through document review, stakeholder interviews and focus groups, and an online Public Consultation. A summary of consultation activities is provided in the Figure below.

Figure 1. Forms of consultation undertaken in the study



Implementation of the EU Disability Strategy

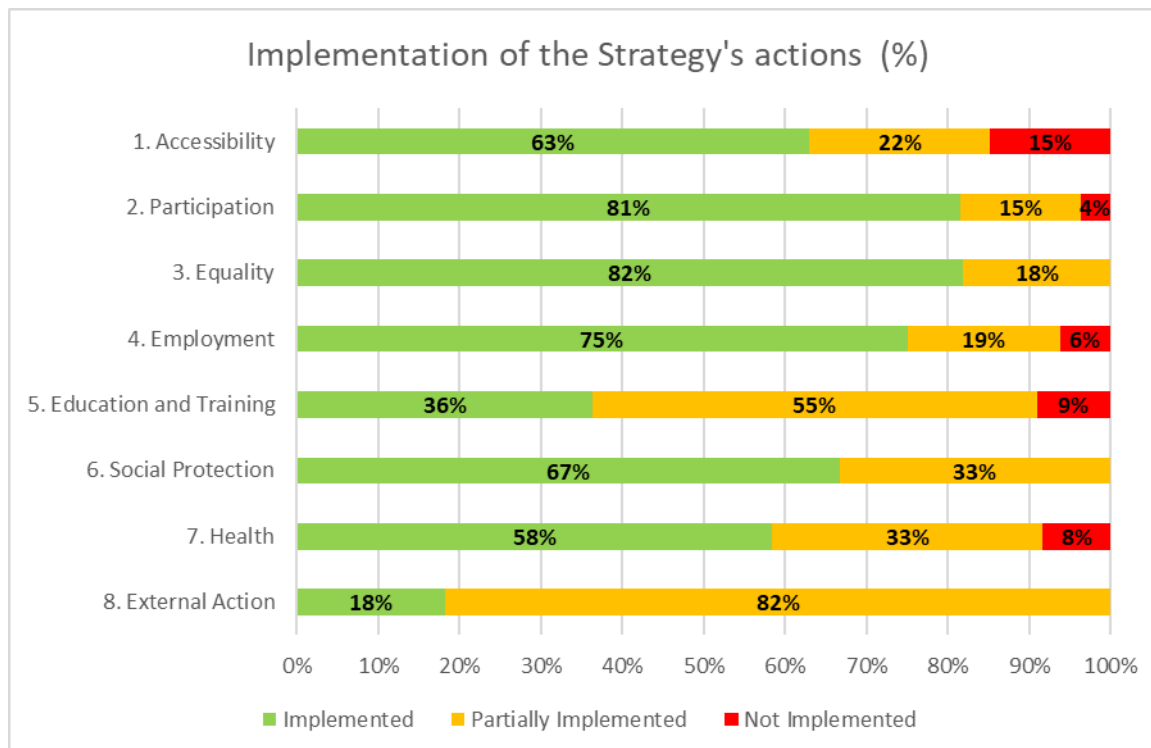
Between 2004 and 2010, the EU implemented the Disability Action Plan.³ The purpose of this plan was to mainstream the disability considerations into relevant EU actions and design measures and actions to improve the quality of the life of people with disabilities.⁴

Important steps were taken in this period to improve the lives of people with disabilities in the EU. To build on this progress, the European Union decided to take further steps to harness its policy and regulatory frameworks to more fully address the needs of people with disabilities.⁵ The European Disability Strategy 2010-2020 aimed to improve the lives of individuals, as well as bringing wider benefits for society and the economy without undue burden on industry and administrations.

The areas of action included in the Strategy required a wide range of different types of measures to deliver their objectives. Awareness raising measures were the most common type of action implemented (31%), followed by legislative measures (17%) and funding (15%). The prominence of awareness raising actions shows the recognition that such actions are essential for fulfilling the objectives of the strategy to ensure that persons with disabilities are aware of their rights and opportunities provided by the EU, and that non-disabled people become more aware of the challenges that people with disabilities face.

The Strategy set out a comprehensive set of actions to achieve transformative change. Analysis of actions defined under the Strategy shows that more than half of the actions in the areas of accessibility, employment, participation, equality, health and social protection have been fully implemented, while most of the actions in the field of education, and external action have been partially achieved. The share of EU level actions implemented by area of action is illustrated in Figure 2.

Figure 2. Share of EU level actions implemented for the eight areas of action



Source: ICF analysis of implementation of actions of the Strategy.

Reflection of the Strategy in the EU policies and programmes

At the strategic level, key EU policy initiatives such as the Europe 2020 strategy, the European Pillar of Social Rights or the European Semester process refer to disability issues and contain significant commitments to address the needs of people with disabilities. However, these groups often appear bracketed and listed alongside other population groups at risk of exclusion or marginalisation (e.g. women, Roma). In this respect, the need to single out the requirements of people with disabilities as a separate principle within the European Pillar of Social Rights is noteworthy.

Importantly, in the European Semester process, individual Member States have received Country specific recommendations relating to disability issues, highlighting a degree of political attention. Disability issues are also mentioned in more specific strategies, such as the EU Health Strategy, the mid-term review of the Education and Training 2020 (ET2020) framework, the Roadmap to a Single European Transport Area and the EU's Strategic Engagement for Gender Equality. The policies thus acknowledge the need to address the specific issues relating to people with disabilities.

Conclusions and recommendations

Headline findings

The EU has made significant progress towards meeting the objectives of the Strategy and ensuring the rights of persons with disabilities.

The Strategy positively contributed to the improvement of the situation of people with disabilities within the EU. The main positive contributions of the Strategy were:

- It placed the disability agenda higher among the EU policy priorities, specifically mainstreaming disability issues in the European Semester;
- It was a key tool for implementing the UNCRPD at the EU level;
- It helped to promote disability issues in the EU legislation, particularly in the areas of accessibility, passenger's rights, de-institutionalisation and EU funding;
- It had a positive direct effect through implementing actions that helped people with disabilities. Significant positive progress has been made in the areas of accessibility, participation and awareness raising; Limited progress was made in the areas of equality, health and external action.
- It provided guidelines and policy examples to Member States that may not otherwise have been developed by them;
- It offered guidelines to Member States on how to monitor and implement the UNCRPD;
- It assisted in developing indicators that can be utilised to facilitate data collection to monitor the implementation of aspects of the Strategy; and,
- Supported NGOs and networks of NGOs at the EU level in their activities.

In terms of supplementing and supporting Member States, the Strategy provided important tools to facilitate the implementation of key actions for people with disabilities:

- EU funding supported implementation of EU legislative actions in Member States and the implementation of specific projects (e.g. the funding provided through the ESI Funds);
- EU established guidelines and standards in different areas, with advice provided to Member States on their implementation (ranging from increased accessibility in transport to guidelines for health professionals on disability matters);

- EU provided strategic policy advice and guidance, such as CSRs highlighting where Member State efforts should focus. This reflects the fact that the issues facing people with disabilities are common to all Member States but vary in scope and significance.

More broadly, there was a consensus among stakeholders that at EU level the Strategy contributed to a change in the overall disability policy discourse towards a human rights-based approach. This had the effect of increasing the visibility and importance of disability issues on the EU agenda.

Effectiveness

Overall, the evidence provided in this study has demonstrated that the Strategy has had a positive effect in the situation of people with disabilities in the EU and in implementing the requirements of the CRPD.

The evidence of the Public Consultation shows that more than half of the respondents (56%) believe that the Strategy contributed to the improvement of the situation of persons with disabilities throughout the Union, and within Member States. Among persons with a disability 52% agreed or somewhat agreed that the situation for persons with disabilities improved in the past 10 years in their MS, with 48% agreeing or somewhat agreeing that the Strategy contributed to improving the situation

Each of the eight areas of action varied in the extent to which they met their objectives. The evidence indicates that significant positive progress was made in the areas of accessibility, participation and awareness raising. Most actions were implemented for these areas. Additionally, there was some progress when baseline data are considered, and both the public consultation and the national expert research indicated the highest level of impacts and contribution of the Strategy.

Some progress was made in the areas of employment and social protection. For these areas, around 70% of actions were implemented, with the public consultation and national experts indicating a medium level of impact and contribution of the Strategy. Limited progress was made in the areas of education and training, health and external action, with implementation of EU level actions and evidence of impact and achievement of objectives weakest for these areas action.

The study identified specific factors that challenged implementation of the Strategy, in this respect the study identified a series of common factors at both Member State and EU level:

- The limited understanding by policy makers of the complexity and spectrum of the disability issues,
- Limited political will,
- Insufficient involvement of people with disabilities in the early phases of the policy making process,
- The limited human and financial resources.

The study found that the most significant factors in enabling progress toward the objectives of the Strategy were:

- The political and legal impact of the CRPD, which provided for a strong impetus for focus and compliance with the legal requirements.
- Advocacy by interest groups and non-governmental organisations, which raised the visibility of disability issues.
- The combination of EU funding and EU legislative activities.

Lessons learned

The Strategy was not established with a detailed action plan or benchmarks against which its progress could be monitored and the implementation fully assessed. The absence of such a framework makes it difficult to undertake continuous monitoring of progress on implementation of actions and, ultimately, assessment of the achievement of the Strategy's objectives.

A lack of regularly collected disaggregated data collected at the level of the individuals made it difficult to monitor the socio-economic trends in relation to the position of persons with disabilities. A study on currently available disaggregated data on people with disabilities could help to understand the data lack currently faced on people with disabilities. Such a study would show whether a strategy on the collection of European wide disaggregated data on individuals with disabilities is necessary and how this could provide an important step forward for understanding in greater detail the current situation of people with disabilities. In addition, the collection of disaggregated data are a precondition for future evaluations of policies aiming to improve opportunities and well-being of people with disabilities.

Aggregated disability-related indicators are planned through the Framework Regulation on Integrated European Social Statistics which should include data on persons with disabilities in the Labour Force Survey, Adult Education Survey, Household Budget Survey, Time Use Survey and the Information and Communication Technology Survey. Following this, disability aspects could be part of the Social Scoreboard.

Several policy areas that are relevant to persons with disabilities are crosscutting and are most directly covered by competencies held at Member State level. Indeed close cooperation between EU actions and Member State policy development is important to ensure complementarity and tackle common barriers to policy implementation (for example, where there is limited political will and understanding of key issues among policy makers).

Recommendations

- Future disability policy should be established with clear indicators, benchmarks, and interim timelines in order to enable the policy makers and other stakeholders to monitor progress in the implementation of Strategy.
- A strategy for collecting disaggregated data on people with disabilities across European countries should be investigated in order to establish the situation of people with disabilities over time and enable comprehensive evaluation of policies in the future.
- Disaggregation of data on intersectionality, e.g. on the situation of women with disabilities, should be considered in the monitoring of future EU disability strategy.
- Additionally, the new data being published through the Regulation on Integrated European Social Statistics can be used to monitor and evaluate the impact of disability legislative and non-legislative actions.
- The EU within its competences should take legislative actions either in the form of disability specific legislation or disability mainstreaming to implement the requirements of the CRPD and address the gaps particularly in the area of consumer protection and equality.
- A disability-specific OMC should be considered – alongside regulatory tools, as well as further EU funding through ESIF and other programmes.

Efficiency

In general, the Strategy does not appear to have been resourced to the extent that would have been necessary to meet its overall and specific objectives. However, as observed in the assessment of effectiveness, those objectives were very ambitious.

Investments in the implementation of Strategy actions facilitated the mainstreaming of disability issues in several areas, this was recognised by stakeholders in EU-level interviews and in the public consultation. However, there was also consensus among the stakeholders that the way in which resources were used for the different areas of action of the Strategy could be improved – specifically ensuring that dedicated support is consistently provided for persons with disabilities and that this support has visibility necessary to encourage take-up. This requires EU and Member State cooperation that would have the benefit of ensuring that EU funds are used extensively to cover the costs of disability-related projects and to achieve the overall objective of the Strategy.

Lessons learned

The resources provided for implementation of the Strategy were not proportionate to the aims of the Strategy. In addition, the overall resources provided for people with disabilities through the ESI Funds (contributing to meeting the aims of the Strategy) can be considered somewhat insecure because the Strategy does not have a dedicated budget line through these funds.

Whilst the Strategy was successful in delivering a range of different actions (particularly some of the key legislative achievements), a dedicated budget would ensure that people with disabilities are not overlooked in programme and project implementation.

Recommendations

- A dedicated budget for implementation of the Disability Strategy, used in combination with existing EU funds, could increase the efficiency of the Strategy through enabling more actions of scale and/or more coordinated approaches.

Relevance

The Strategy is highly relevant to the CRPD and constitutes the main implementation instrument of the CRPD in the EU. Furthermore, most of the areas of the Strategy remain relevant for future EU strategy - a large majority of consultees (over 70%) indicated that 7 out of 8 objectives were relevant for future action, external action being less relevant.

Furthermore, the key challenges of the Strategy remain and require addressing to meet the EU's CRPD commitments, for example: more can be done to increase and/or improve accessibility to goods and services, participation in society, employment, living conditions, and EU external policies. Discrimination of disabled people is currently not explicitly prohibited in areas beyond employment and occupation, nor is disability mainstreamed in education and health, beyond cross border cases for the latter.

Lessons learned

There was a consensus in the EU stakeholder interviews that the Strategy was relevant in making a significant contribution to change the policy discourse towards a human rights-based approach for people with disabilities.

It was also highlighted by disabled persons organisations that disabled persons should continue to become more involved in the policy formulation and delivery. The Public Consultation showed that there were differing perspectives between those with disabilities and those without regarding perceived progress in delivering the objectives of the Strategy, with non-disabled persons more likely to state progress had been made than those with disabilities.

It was also found during the study that there was a low level of knowledge about the Strategy amongst the stakeholders consulted through the Member State research, and a corresponding low level of perceived influence of the Strategy in Member State policy discourse. In one respect, this is reflective of the high profile of the CRPD in Member States. However, it also suggests that more could be done to raise awareness of the relevance of the Strategy in Member States as this may have the effect of raising the profile of disability issues.

Recommendations

- The areas of action included in the Strategy were relevant and remain relevant for people with disabilities, as such, these areas should remain the core considerations for future EU disability strategy. This includes the area of external action. Whilst fewer respondents to the Public Consultation highlighted this area as of continuing importance, it is relevant to the CRPD, particularly to Article 32 on international cooperation.
- To remain relevant and retain the supportive collaboration of organisations representing persons with disabilities, it is imperative that a prominent role in design, implementation, and monitoring of the strategy is played by civil society organisations (and particularly disabled people's organisations).
- Consideration should be given to the design of future EU disability policy that more explicitly demonstrates the contribution and responsibility of the Member States. This approach may also add value to the design of future disability strategy through increasing understanding at EU level of the ways in which the Member State strategy may be supplemented and supported. This could be increasing the relevance of the Strategy to Member State needs.

Coherence

Overall, the eight objectives of the Strategy and four implementation instruments were assessed in terms of internal coherence between the thematic areas and external coherence with EU policies and actions, the CRPD and Member State level policies and actions. Overall, internal coherence of the Strategy is high as the eight objectives of the Strategy and four implementation instruments are coherent with each other.

In terms of strategic EU policies and actions, the European Pillar of Social Rights, Charter of Fundamental Rights, and European funding instruments (ESF, EDRF) are coherent with the Strategy. However, there could be improved alignment with the EU's strategic economic and social policy coordination processes i.e. Europe 2020 and the European Semester through more systematic inclusion and dedicated resources to address issues relevant to people with disabilities.

Lessons learned

The Strategy's areas of action and implementation instruments are generally aligned with the UN CRPD. Progress has been achieved through the adoption of the European Accessibility Act, launch of a pilot Disability Card, awareness raising campaigns on non-discrimination in the labour market and use of the ESF funding for approaches to implement the deinstitutionalisation. However, inconsistencies remain in the areas of Equality, Education and Training and Social Protection. For example, disability is not part of the Social Scoreboard, making it difficult to monitor the social situation of persons with disability. Also, there is no unanimity in the Council for the adoption of the proposed Horizontal Equal Treatment Directive. The CRPD provides the legal basis to advance the full participation of people with disabilities, both for the EU and all of its Member States. Thus, it has a higher level of recognition – particularly among Member States - where it is a greater influence on the formulation of national policy than the Strategy.

The EU level stakeholder interviews and document review suggested that the coherence (and ultimately effectiveness) of the Strategy with other EU policies,

programmes, and funding streams may have benefitted from greater mainstreaming which could have been achieved through dedicated, active, focal points in all the European institutions.

The Public Consultation found that an average of around 40% of respondents agree or somewhat agree that the national priority measures of their country are coherent with the eight areas of action of the Strategy. Member State research found greatest coherence where EU Directives were transposed into national law but also identified national policies that were closely aligned with the eight objectives of the Strategy. However, gaps between the objectives of the Strategy and national policy drivers were highlighted. In this respect the most significant issues where Member States policy was not as successful in promoting the objectives of the Strategy were a lack of accessibility in goods and services, need to improve the deinstitutionalisation process, lack of legal capacity, low levels of labour market participation, low participation rates in inclusive education, insufficient social protection and, inaccessible healthcare.

Recommendations

- It is therefore recommended that future EU disability strategy be delivered through strengthened coordination between, and within EU institutions, with designated focal points in each EU institutions (and DGs). In addition, this should include monitoring of measures and actions to consider the potential for, and actions taken to deliver disability mainstreaming.
- Coherence of the Strategy with the CRPD and with actions at Member State level could be improved through a greater / stricter alignment with the different areas covered under the CRPD (as Member States have legal obligations in taking actions to implement the Convention).
- Consideration in the design of future EU disability strategy should consider the extent to which the gaps between EU and Member State policy objectives can be addressed. Additionally, other recommendations, such as a dedicated implementation budget for EU strategy related to persons with disability and a greater number of more active and resourced focal points to advocate for the Strategy may help to address these issues.

EU added value

The analysis conducted shows a consensus amongst the various stakeholders as to the fact that the Strategy has delivered significant added value. Both DHLG representatives and NGOs recognise significant added value of the Strategy in helping eliminate barriers for persons with disabilities and helping to implement the UNCRPD.

Lessons learned

The following specific conclusions emerge from the analysis of EU added value:

- Volume effects: a wide range of EU level actions were established to deliver the objectives of the Strategy – the Strategy also provided renewed momentum for existing planned actions. Production of a strategy was therefore an important stimulus which led to a greater volume of activity.
- Inclusion of a wide range of policy areas included in the Strategy also increased the volume of activity (understood in terms of the number of actions and resources used to deliver the actions of the Strategy for persons with disabilities) in the eight areas of action.
- Scope: implementation of the Strategy actions required the adoption of disability-specific legislation and the improvement of pre-existing legislative frameworks.
- Role effects: Disability mainstreaming in the EU legislation has significantly improved, ensuring that several key EU legislative acts have a disability

component. However, further improvement is needed to ensure disability-mainstreaming in all EU legislation, policies and programmes, particular missed opportunities were the Youth Guarantee and the adoption of the consumer protection legislation. The 2020 Youth Guarantee includes an explicit commitment to provide support for young people with caring responsibilities and young people suffering from ill health or disabilities

- Process: The Strategy influenced the agenda setting through encouraging a human rights-based approach to disability policy. Stakeholders at EU level valued this as an important tool to guide the implementation of the CRPD at EU level.

Assessing the extent to which this added value has translated into significant impact proved problematic. This is due to the lack of disaggregated data, which makes it difficult to monitor the situation of people with disabilities. Assessing progress made through specific actions also requires an effective implementation at Member State level, with impact requiring long-term monitoring.

Recommendations

- Assessment of the EU added value of a future EU disability strategy requires a baseline position and monitoring framework to be established and managed. The monitoring mechanism should pay particular attention to the complementarity between the EU and MS actions to ensure that the requirements of the CRPD are implemented in their entirety.
- Strengthened coordination between, and within EU institutions (as described above in relation to Coherence) should include the monitoring of measures and actions to consider mainstreaming.
- Assessment of added value also requires disability-related statistical indicators. This is important to understand impact over time and also to understand impact on persons with disabilities, including different types of disabilities and the issues of intersectionality.

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