

Annual report - EC spending on disability inclusion in global actions 2018-2020

**Analysis of data from the OECD-DAC disability policy marker**

November 2022

# Table of Contents

[Table of Contents 2](#_Toc119574379)

[Introduction 2](#_Toc119574380)

[Executive Summary 3](#_Toc119574381)

[The OECD-DAC disability policy marker 5](#_Toc119574382)

[Methodology 6](#_Toc119574383)

[Limitations 6](#_Toc119574384)

[Key findings 7](#_Toc119574385)

[The EC has rapidly adopted the OECD-DAC disability policy marker 7](#_Toc119574386)

[The share of EC ODA projects given a positive disability marker score has been increasing, but remains low 7](#_Toc119574387)

[In 2020, very few EC ODA projects had disability inclusion as their principal objective 9](#_Toc119574388)

[In 2020, many EC ODA projects targeting gender equality overlooked disability inclusion 10](#_Toc119574389)

[The disability policy marker offers valuable insights, but could be improved further. 10](#_Toc119574390)

[Recommendations 12](#_Toc119574391)

[Annex: analysis of EC ODA by value of spending 14](#_Toc119574392)

[Document credits 16](#_Toc119574393)

# Introduction

### The European Disability Forum

The European Disability Forum is an independent NGO that represents the interests of 100 million Europeans with disabilities. EDF is a unique platform which brings together representative organisation of persons with disabilities from across Europe. EDF is run by persons with disabilities and their families. We are a strong, united voice of persons with disabilities in Europe.

### Acknowledgements

Thanks to all who participated in the drafting of this position paper.

# Executive Summary

In 2018, the Organisation for Economic Cooperation and Development’s Development Assistance Committee (OECD-DAC) introduced the “disability policy marker” – a tool to monitor how far Official Development Assistance (ODA) aims to be inclusive of persons with disabilities. This paper analyses the data that the European Commission (EC) has reported since the marker was first introduced.

The paper finds that:

* **The EC has rapidly adopted the disability policy marker**. The marker is voluntary, and most OECD-DAC members do not yet use it consistently. In contrast, the EC has screened 100% of its applicable[[1]](#footnote-1) ODA projects using the marker, in every reporting year since the marker was first introduced.
* **The share of applicable EC ODA projects reported as disability inclusive has been increasing since 2018.**
* **However, the share of applicable EC ODA projects reported as disability inclusive remains low**. Even in 2020 (the most recent year for which data is available), some 84% of applicable projects still did **not** target the inclusion of persons with disabilities in any significant way.
* **Projects with a principal – as opposed to a secondary – objective on disability inclusion were particularly rare** (based on 2020 data).
* Many projects targeting gender equality **overlooked the intersection between gender and disability** (based on 2020 data).

The disability policy marker reveals much valuable information, as the analysis in this paper illustrates. However, there are still important data gaps that require attention. Furthermore, qualitative analysis, including research by EDF and its members, remains important as a complement to the marker’s quantitative insights.

The paper recommends that:

* The **European Commission** should rapidly increase the share of its ODA projects that meet the disability policy marker’s criteria to be reported as disability inclusive. As part of this, the EC should review whether a greater proportion of projects should have disability inclusion as their **principal** objective; and it should ensure that all new projects with objectives on gender equality pay attention to the intersection between gender and disability. Disabled people’s organisations (DPOs), including those from the Global South, should play a central role in all efforts towards disability-inclusive programming.
* **OECD-DAC members** should follow the EC’s example of applying the disability policy marker to 100% of their ODA projects.
* **UN entities and other multilateral bodies** should report publicly on how far their spending aims to be inclusive of persons with disabilities, including through the OECD-DAC Creditor Reporting System (CRS) database.
* **The EC and other OECD-DAC members collectively** should agree to strengthen the design and implementation of the disability policy marker, including by:
	+ Making the marker mandatory, rather than voluntary;
	+ Refining the scoring criteria so that they align fully with the UN Convention on the Rights of Persons with Disabilities;
	+ Aligning the scoring criteria more closely with the OECD-DAC gender marker;
	+ Introducing a purpose code to track funding to DPOs; and
	+ Introducing a centralised quality assurance and learning process to enhance comparability of different OECD-DAC members’ reporting.
* The EC should work with the OECD-DAC to **introduce additional Agency Codes** in the CRS database corresponding to the EC’s different Directorates-General, to allow more detailed comparisons and accountability.

# The OECD-DAC disability policy marker

The Organisation for Economic Cooperation and Development-Development Assistance Committee (OECD-DAC) is an international forum of the largest aid providers, gathering 30 members among which:

• the European Union (with the EU institutions represented by the Directorate General International Partnerships - DG INTPA);

• and 19 EU member states (Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Luxembourg, The Netherlands, Poland, Portugal, Slovak Republic, Slovenia, Spain and Sweden).

The OECD-DAC has developed the “disability policy marker” - a tool to monitor how far Official Development Assistance (ODA) aims to be inclusive of persons with disabilities.

The marker allows governments in the OECD-DAC to allocate each of their ODA projects a score:

* Score 2 means that inclusion and empowerment of persons with disabilities is the principal objective of the project;
* Score 1 means that inclusion and empowerment of persons with disabilities is a significant objective of the project (but not the main reason why the project is being undertaken);
* Score 0 means that the project does not target disability inclusion.

Not all ODA projects are scored using the disability policy marker, since use of the marker is voluntary.

More detailed information can be found in [the OECD-DAC’s handbook on the marker](https://one.oecd.org/document/DCD/DAC/STAT%282020%2948/en/pdf).

The marker was introduced in 2018. This paper presents an analysis of the data that the European Commission (EC) has reported during the marker’s first three years of operation – 2018, 2019 and 2020. EDF will regularly update the findings in this paper as new marker data becomes available.

# Methodology

The main method used for this paper was quantitative analysis of ODA spending data from the OECD-DAC Creditor Reporting System database, covering the three years for which data is so far available: 2018, 2019 and 2020.

The analysis throughout the paper looks at the **number** of EC ODA projects that have been reported as having objectives on disability inclusion. This gives an insight into how systematically the EC is considering disability inclusion when it plans projects. To complement this analysis based on the number of projects, an annex to the paper looks instead at the **value** of EC ODA spending that was reported as having objectives on disability inclusion.[[2]](#footnote-2)

Further details on the methods used for calculations are presented in notes throughout the paper.

# Limitations

The paper focuses specifically on spending by the EC. Given the deliberately short length of the paper, it was not feasible to include detailed analysis on other European Institutions that administered ODA during the period 2018-2020, i.e. the European Development Fund and the European Investment Bank. It would, though, be interesting to extend the analysis beyond the European Commission in future.

The scope of the analysis is also restricted by the inherent limits in the way that the disability policy marker has been designed and applied. These limitations are discussed in more detail later in the paper, drawing from previous publications on this subject,[[3]](#footnote-3) as well as the author’s background experience in developing and using markers.

Because of the disability policy marker’s limitations, the findings below need to be treated with a degree of caution. It is suggested that readers may want to contextualise the findings by cross-referring to some of the qualitative analysis by EDF and others that is also referenced in the text.

Despite its limitations, the disability policy marker offers important indications on the extent to which EC ODA aims to be inclusive of persons with disabilities. These findings are discussed in more detail in the following sections.

# Key findings

## The EC has rapidly adopted the OECD-DAC disability policy marker

As set out above, the use of the disability policy marker is voluntary: not all OECD-DAC members have yet adopted the marker, nor have they applied it to all of their applicable[[4]](#footnote-4) ODA spending.

The EC,[[5]](#footnote-5) in contrast, **screened 100% of its applicable ODA projects using the marker**, in all three years since the marker was introduced.[[6]](#footnote-6) Out of the 30 members of the OECD-DAC, only two others (Iceland and Norway) have been so consistent in their use of the marker.

The EC’s consistent use of the marker is a good practice that all OECD-DAC members should aim to replicate.

## The share of EC ODA projects given a positive disability marker score has been increasing, but remains low

### Trends over the three years from 2018 to 2020

Figure 1 shows the trend in the percentage of applicable EC ODA projects that were given a positive disability policy marker score, i.e. a score of 2 (disability inclusion is the principal objective), or a score of 1 (disability inclusion is a significant objective). **The percentage of such projects given a positive score has increased steadily during the three years since the marker was introduced, from around 2% in 2018, to around 16% in 2020**. While it is possible that some of this increase may result from growing familiarity with the marker, overall it is encouraging that there has been such a clear upward trend.

**Figure 1: EC ODA projects given a positive disability policy marker score, 2018-2020**

Note: the analysis is based on data from the Creditor Reporting System database, downloaded in October 2022. The analysis uses data on allocable ODA commitments, and the percentages are calculated based on the number of projects given scores of 2 and 1, out of the total.

### Projects with objectives on disability inclusion in 2020

While the share of ODA projects given a positive score has been increasing over time, even in 2020 the share of such projects remained low. **Some 84% of applicable projects were given a score of 0 – that is, they did \*not\* target the inclusion of persons with disabilities in any significant way** (Figure 2). This suggests that the EC still has a long way to go before it is fully meeting its obligations under Article 11 (Humanitarian Action) and Article 32 (International Cooperation) of the UN Convention on the Rights of Persons with Disabilities.[[7]](#footnote-7)

**Figure 2: percentage of applicable EC ODA projects with objectives on the inclusion of persons with disabilities in 2020**

Note: the analysis is based on data from the Creditor Reporting System database, downloaded in October 2022. The analysis uses data on allocable ODA commitments, and the percentages are calculated based on the number of projects given scores of 1 or 2 (“objectives on disability inclusion”) or scores of 0 (“no objectives on disability inclusion”).

## In 2020, very few EC ODA projects had disability inclusion as their principal objective

In 2020, the EC gave 149 applicable projects positive scores against the disability policy marker. **Of these 149 projects, only 7 had disability inclusion as their principal objective** (i.e. score 2). The remaining 142 projects had disability inclusion as a significant objective, but not the main reason for undertaking the project (i.e. score 1).[[8]](#footnote-8)

Projects scored 2 are not necessarily more important than projects scored 1: in principle, both can be equally impactful.[[9]](#footnote-9) Indeed, any OECD-DAC member that is successfully mainstreaming the rights of persons with disabilities across its work should have a large number of projects with a score of 1.

However, if the number of projects scored 2 is very low, this may be a warning sign that an OECD-DAC member is not paying sufficient attention to the specific measures needed to break down barriers that persons with disabilities face. EDF will continue to monitor closely the number of projects scored 2 in future years’ data.

## In 2020, many EC ODA projects targeting gender equality overlooked disability inclusion

As well as its policy marker on disability inclusion, the OECD-DAC also has a policy marker on gender equality. Analysing the two markers together can give insights on how OECD-DAC members are approaching the intersection between disability and gender.

In 2020, the EC had a total of 956 applicable ODA projects, and it reported that 640 of these projects had objectives on gender equality (either as the principal objective, or as a significant objective). **Of these 640 projects with objectives on gender equality, only around 22% also had objectives on disability inclusion**.[[10]](#footnote-10) This suggests that most EC ODA projects in 2020 did not adequately take into account the intersection of disability and gender.

## The disability policy marker offers valuable insights, but could be improved further.

As the sections above show, disability policy marker data can offer some valuable insights into the extent to which OECD-DAC members are living up to their obligations on disability-inclusive international cooperation.

But taken in isolation, the disability policy marker data also leaves important questions unanswered. There are three main reasons for this.

The first reason relates to the **design of the marker**. The marker does not fully cover some critical dimensions of compliance with the UN Convention on the Rights of Persons with Disabilities. For example, the marker does not directly assess whether OECD-DAC members plan to ensure the full participation of Disabled People’s Organisations (DPOs) throughout the project cycle.[[11]](#footnote-11) In addition, the criteria for marker reporting include less detail than those in the OECD-DAC’s handbook on the gender marker, for instance on the need to ‘do no harm’.[[12]](#footnote-12) Moreover, the marker is applied at an early stage in project implementation, so it tells us about projects’ intentions, but not about their outcomes.[[13]](#footnote-13)

The second reason relates to **adoption of the marker.** Not only is marker uptake inconsistent among OECD-DAC members (as discussed above). It is also rare for organisations outside the OECD-DAC – in particular, multilateral bodies such as UN entities - to make use of the marker for their own reporting.[[14]](#footnote-14)

The third reason relates to **implementation of the marker**. OECD-DAC members are responsible for giving scores to their own projects. Scoring is inevitably a subjective process. Many of the people responsible for reporting are not specialists in the rights of persons with disabilities, and may interpret the OECD-DAC’s guidance in different ways. The OECD-DAC does not have any centralised process to quality assure the disability policy marker data, nor to ensure that members are interpreting the reporting guidelines in a comparable way.

In addition, specifically in the case of the EC, the data also leaves unanswered questions about the relative commitment to disability inclusion across the Commission’s different Directorates-General (DGs). This is because the OECD-DAC’s Creditor Reporting System does not itemise which DG was responsible for which ODA project. This is in contrast to some other DAC members, for whom the database offers a more granular breakdown of which part of government was in the lead.

In the long term, the EC should work with the OECD-DAC to address these issues.

But qualitative data also has an important role to play in helping deal with some of the questions that the disability policy marker cannot currently answer on its own. Such qualitative data can include:

* **Data on OECD-DAC members’ policies and processes for the inclusion of persons with disabilities**. For example, in 2021 EDF published a series of fact sheets on policies and processes across 10 OECD-DAC members.[[15]](#footnote-15) The qualitative information in these fact sheets can help set members’ marker scores in context, and can even offer some clues on whether they are interpreting the DAC’s reporting guidelines in a comparable way.
* **Data on projects that have been given positive scores on the disability policy marker.** EDF members are currently planning some detailed analysis on a sample of projects that were given positive marker scores, to examine how far these projects really are inclusive of persons with disabilities, and how far persons with disabilities had the opportunity to participate throughout the project cycle. EDF plans to refer to the results of this work in its next year’s report on the disability policy marker.

# Recommendations

### The European Commission should:

1. **Rapidly increase the share of its ODA projects that meet the criteria to be awarded positive scores on the disability policy marker**. EDF’s previous work, including through its involvement in the [Bridging the Gap II project](https://www.edf-feph.org/projects/bridging-the-gap-ii-inclusive-policies-and-services-for-equal-rights-of-persons-with-disabilities/) and through its [fact sheets on disability inclusion in European Union development and humanitarian aid](https://www.edf-feph.org/content/uploads/2021/07/EU-factsheet-FINAL.docx), includes many indications on concrete steps that can be taken to ensure the inclusion of persons with disabilities in EC ODA projects. It is essential for DPOs, including those from the Global South, to play a central role in all efforts towards disability-inclusive programming.

2. **Rapidly review**, in full consultation with DPOs, **whether there is a need to increase the proportion of projects that have disability inclusion as their \*principal\* objective**.

3. **Ensure that all new projects with objectives on gender equality pay attention to the intersection between gender and disability.**

### OECD-DAC members should:

1. Follow the EC’s example of **applying the disability policy marker to 100% of their ODA projects**.

### UN entities and other multilateral bodies should:

1. **Report publicly on how far their spending aims to be inclusive of persons with disabilities**, including through the OECD-DAC Creditor Reporting System (CRS) database.

### The EC and other OECD-DAC members collectively should:

1. **Call for the OECD-DAC to strengthen the design and implementation of the disability policy marker**, including by:
	1. Making the marker mandatory, rather than voluntary;
	2. Refining the scoring criteria so that they align fully with the UN Convention on the Rights of Persons with Disabilities (in particular by requiring participation of DPOs);
	3. Aligning the scoring criteria more closely with the OECD-DAC gender marker; and
	4. Introducing a purpose code to track funding to DPOs (similar to the existing code for funding to women’s equality organisations and institutions[[16]](#footnote-16))
	5. Introducing a centralised quality assurance and learning process to enhance comparability of different OECD-DAC members’ reporting. The process could be sample based to allow for resource limitations.
2. The EC should work with the OECD-DAC to introduce additional Agency Codes in the CRS database corresponding to the EC’s different Directorates-General, to allow more detailed comparisons and accountability.

# Annex: analysis of EC ODA by value of spending

Whereas the analysis in the main body of this paper looks at the **number of projects** reported as disability inclusive by the EC, this annex instead presents results on the **value of applicable[[17]](#footnote-17) spending** reported as disability inclusive. As would be expected, there are some small differences between the two sets of results (particularly on gender), but overall the analysis in this annex is consistent with the conclusions in the main body of the text above.

### Table A1: Headline results from 2018 to 2020

|  |  |  |  |
| --- | --- | --- | --- |
| **Year** | **2018** | **2019** | **2020** |
| **Percentage of applicable EC ODA spending given a disability marker score of either 1 or 2** | 1% | 8% | 19% |

Notes: the analysis is based on data from the Creditor Reporting System database, downloaded in November 2022. The analysis uses data on allocable ODA commitments, and the percentages are calculated based on the value of spending.

### Table A2: Breakdown of disability marker scores in 2020

|  |  |  |  |
| --- | --- | --- | --- |
| **Score** | **0** | **1** | **2** |
| **Percentage of applicable EC ODA spending given this score in 2020** | 80.6% | 19.0% | 0.4% |

Notes: the analysis is based on data from the Creditor Reporting System database, downloaded in November 2022. The analysis uses data on allocable ODA commitments, and the percentages are calculated based on the value of spending.

### Table A3: Overlap between objectives on disability inclusion \*and\* gender equality in EC ODA in 2020

|  |  |
| --- | --- |
| Total value of spending\* | 11,806 million USD |
| Value of spending\* with objectives on gender equality (A) | 6,554 million USD |
| Value of spending\* with objectives on gender equality **and** disability inclusion (B) | 2,213 million USD |
| Value of spending\* with objectives on gender equality and disability inclusion, as a percentage of total spending with objectives on gender equality (B/A) | 34% |

\*Notes: the analysis is based on data from the Creditor Reporting System database, downloaded in November 2022. The analysis on spending takes into account only data on **allocable** ODA **commitments**, in constant 2020 prices. “With objectives on gender equality” means that the spending was allocated a score of 1 or 2 using the gender equality marker; “with objectives on disability inclusion” means that the spending was allocated a score of 1 or 2 using the disability policy marker.

Comments: The main text of this paper reported that, when the data is analysed based on the total **number** of projects,[[18]](#footnote-18) only around 22% of projects with objectives on gender equality also have objectives on disability inclusion. This percentage increases to 34% when, as in Table A3 above, the analysis is instead based on the total **value** of spending.[[19]](#footnote-19)

This difference between the two analyses implies that in 2020, projects with objectives on both gender equality and disability inclusion tended to be higher-value projects.

It is positive that these higher-value projects have objectives on both gender equality and disability inclusion. Still, it would be misleading to give these projects too much weight when drawing overall conclusions. We can only start to take assurance that the EC has integrated the rights of persons with disabilities systematically into its project planning processes when **all** projects - large or small - have objectives on disability inclusion.

# Document credits

This document was prepared by Polly Meeks, independent researcher and consultant for EDF. Website: <https://pollymeeks.wordpress.com/>.

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1. The OECD-DAC says that the marker is applicable to only some types of ODA spending, known as “allocable” ODA. More details are available on p.19 of the [OECD-DAC handbook on the marker](https://one.oecd.org/document/DCD/DAC/STAT%282020%2948/en/pdf). [↑](#footnote-ref-1)
2. The author is grateful to Chantal Baumgarten (CBM Switzerland) for helpful discussions on the advantages and disadvantages of analysing the data by number vs. by value of projects. [↑](#footnote-ref-2)
3. For example: International Disability Alliance, European Disability Forum, International Disability and Development Consortium and Global Action on Disability Network, 2019, [Call to action – implementation of the disability inclusion marker](https://www.iddcconsortium.net/wp-content/uploads/2019/12/Call-to-Action-on-the-Disability-DAC-Marker_final.pdf); European Disability Forum, 2020, [Information on the DAC policy marker on disability](http://www.edf-feph.org/content/uploads/2020/12/information_disability_marker_may_2020.docx), p.3; Meeks/Center for Inclusive Policy, 2020, [Getting the data: how much does aid money support inclusion of persons with disabilities?](https://inclusive-policy.org/wp-content/uploads/2020/09/OECD-DAC-data-guide-disability-marker_1.0.docx), p.14 [↑](#footnote-ref-3)
4. The OECD-DAC says that the marker is applicable to only some types of ODA spending, known as “allocable” ODA. More details are available on p.19 of the [OECD-DAC handbook on the marker](https://one.oecd.org/document/DCD/DAC/STAT%282020%2948/en/pdf). [↑](#footnote-ref-4)
5. Throughout the text, references to the EC refer to all EC Directorates-General collectively. [↑](#footnote-ref-5)
6. Based on analysis of allocable commitments [↑](#footnote-ref-6)
7. [UN Convention on the Rights of Persons with Disabilities](https://www.un.org/disabilities/documents/convention/convoptprot-e.pdf), Article 32 [↑](#footnote-ref-7)
8. Based on analysis of Creditor Reporting System data, downloaded in October 2022. The analysis uses data on allocable ODA commitments. [↑](#footnote-ref-8)
9. OECD DAC, 2020, [The OECD-DAC policy marker on the inclusion and empowerment of persons with disabilities: Handbook for data reporters and users](https://one.oecd.org/document/DCD/DAC/STAT%282020%2948/en/pdf), p.14 [↑](#footnote-ref-9)
10. Based on analysis of data from the Creditor Reporting System database, downloaded in October 2022. The analysis used data on allocable ODA commitments. [↑](#footnote-ref-10)
11. Source: author’s analysis of OECD DAC, 2020, [The OECD-DAC policy marker on the inclusion and empowerment of persons with disabilities: Handbook for data reporters and users](https://one.oecd.org/document/DCD/DAC/STAT%282020%2948/en/pdf), pp.10, 11, 13, 14, 15 [↑](#footnote-ref-11)
12. The [OECD-DAC’s handbook on the gender equality marker](https://www.oecd.org/dac/gender-development/Handbook-OECD-DAC-Gender-Equality-Policy-Marker.pdf) says that doing no harm is a requirement even for projects scored zero (p.10), whereas the [OECD-DAC handbook on the disability policy marker](https://one.oecd.org/document/DCD/DAC/STAT%282020%2948/en/pdf) only lists ‘do not harm’ as a ‘recommended practice’, outside the scope of the formal rules for use of the marker (p.15). [↑](#footnote-ref-12)
13. The [OECD-DAC’s handbook on the marker](https://one.oecd.org/document/DCD/DAC/STAT%282020%2948/en/pdf) (pp.15-16) recommends that projects targeting disability inclusion should collect data to monitor the results for persons with disabilities, but this is a recommendation rather than a requirement. This contrasts with the criteria for the OECD-DAC gender marker (see OECD-DAC, 2016, [Handbook on the OECD-DAC gender equality marker](https://www.oecd.org/dac/gender-development/Handbook-OECD-DAC-Gender-Equality-Policy-Marker.pdf), e.g. pp.10-11) [↑](#footnote-ref-13)
14. It is true that some disability policy marker data relating to **earmarked** spending through multilateral bodies is available. However, marker data on multilaterals’ spending of **core** contributions is generally not available. Sources: unpublished analysis on entities outside the OECD-DAC, by Peter Fremlin, shared June 2022; plus author’s analysis of ‘Type of Aid’ data on the Creditor Reporting System database. [↑](#footnote-ref-14)
15. EDF, 2021, [Mapping disability inclusiveness of European member states’ development and humanitarian aid](https://www.edf-feph.org/projects/mapping-disability-inclusiveness-of-european-member-states-development-and-humanitarianaid/) (covers 10 European members of the OECD-DAC). A [similar fact sheet on Switzerland](https://www.cbmswiss.ch/fileadmin/user_upload/Dokumente/Unsere_Arbeit/Politische_Arbeit/Events/cbm-fact-sheet-crpd-implementation-switzerland-focus-international_cooperation.pdf) has also been published by CBM Switzerland. [↑](#footnote-ref-15)
16. See OECD-DAC, 2016, [Handbook on the OECD-DAC gender equality marker](https://www.oecd.org/dac/gender-development/Handbook-OECD-DAC-Gender-Equality-Policy-Marker.pdf), p.7 [↑](#footnote-ref-16)
17. I.e. treating only allocable spending as applicable [↑](#footnote-ref-17)
18. Allocable projects [↑](#footnote-ref-18)
19. Allocable spending [↑](#footnote-ref-19)