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COVER NOTE

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EXECUTIVE SUMMARY OF THE EVALUATION of the EU Drugs Strategy 2021-2025 and EU Drugs Action Plan 2021-2025

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COMMISSION STAFF WORKING DOCUMENT
EXECUTIVE SUMMARY OF THE EVALUATION

of the EU Drugs Strategy 2021-2025 and EU Drugs Action Plan 2021-2025

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BACKGROUND TO THE EVALUATION

The production, trafficking and use of illicit drugs have serious health, economic, environmental and security consequences for societies. They affect millions of people in the EU and globally. To better address this complex issue, in December 2020, the European Union adopted the third **EU drugs strategy for 2021-2025**, along with a five-year Action Plan on drugs.

The EU drugs strategy provides the political framework and priorities for EU drugs policy for 2021-2025. It is structured around **three main pillars** (or overarching objectives):

- reducing drug supply,
- reducing demand, and
- addressing drug-related harm;

and **three cross-cutting themes**:

- international cooperation,
- research, innovation and foresight, and
- coordination, governance and implementation.

Complementing the strategy, the **EU drugs action plan for 2021-2025** spells out 85 actions to be implemented by the EU and Member States to achieve the 11 priorities listed by the strategy. In October 2023, in response to the growing threat posed by drug-related organised crime, the Commission put forward the EU Roadmap to boost the fight against drug-trafficking and organised crime. Complementing the EU strategy and action plan for 2021-2025, this EU Roadmap lists 17 concrete actions to be implemented at EU level by the end of 2025.

The drugs strategy calls on the Commission to initiate an overall external **evaluation of the implementation of the Strategy and Action Plan**, which was duly carried out from January to December 2024. This was based on evidence collected from a range of stakeholders including national authorities, international organisations, the private sector, civil society and academia, through a public consultation, surveys and targeted interviews in addition to desk work.

In this staff working document, the Commission evaluates whether the drugs Strategy and Action Plan contributed to the achievement of their overarching objectives by assessing the **effectiveness, efficiency, coherence, EU added value and relevance** of their measures and their implementation at EU and national level. Lastly, it outlines lessons learned and potential ways forward in view of the discussions on the future EU drugs policy framework before the current one expires on 1 January 2026. In doing so, the evaluation found several limitations: first, data availability on drugs remains constrained by a two-year delay between when the data is collected, analysed and reported by national authorities; second, limited availability of evidence related to the implementation of actions by the Member States due to differences in reporting, national policy and political context and lack of impact indicators; third, the action plan lists 11 indicators which are not attributed to actions and most are non- measurable EU-wide; and last, governance is questioned as strategic priorities and actions are not directly attributed to concrete responsible parties either at EU or national level.

This evaluation focuses on the impact of the implemented actions and measures against the **11 strategic priorities** as listed below:

Under the **drug supply reduction** pillar, the strategy aims to enhance security with measures to:

- disrupt high-risk drug-related organised crime groups, address links with other security threats and improve crime prevention (strategic priority 1);
- increase the detection of illicit drug trafficking including drug precursors at EU points of entry and exit (strategic priority 2);
- tackle the exploitation of logistical and digital channels for drug trafficking and increase seizures of drugs, in close cooperation with the private sector (strategic priority 3);
- dismantle illicit drug production and cultivation; prevent the diversion of drug precursors and address environmental damage (strategic priority 4).

Under the **drug demand reduction** pillar, the strategy seeks to promote drug prevention, treatment and care services with measures to:

- prevent drug use and raise awareness of the adverse effects of drugs (strategic priority 5);
- ensure access to and strengthen treatment and care services (strategic priority 6).

Under the **addressing drug-related harm** pillar, the strategy seeks to minimise the harm caused by drugs with measures that:

- promote risk- and harm-reduction interventions to protect and support people who use drugs (strategic priority 7);
- address the health and social needs of people who use drugs in prison settings and after release (strategic priority 8).

As regards the **cross-cutting topics**, the strategy envisages measures to strengthen **international cooperation** with non-EU countries, regions and international partners (strategic priority 9); promote **research, innovation and foresight** by building synergies between the EU and Member States and increasing preparedness for future challenges and crises (strategic priority 10); and ensure adequate **coordination, governance and implementation** of the Strategy and Action Plan, with adequate resources at EU and national levels (strategic priority 11).

KEY FINDINGS

I. Trends in the EU drug market since 2021

When the strategy was adopted in 2021, the EU illicit drug market was valued at over EUR 31 billion. An estimated 83.4 million adults had used illicit drugs, and opioids were involved in 75% of fatal overdoses. Moreover, levels of violence and corruption linked to drug-trafficking were increasing as major EU ports were becoming hubs for smuggling drugs and precursors into the EU via expanded international trafficking routes.

Since 2021, the EU ‘drug landscape’ has changed in a number of ways. **Record amounts of drugs are being seized at ports and new trafficking methods have emerged, including corruption and violence.** Drugs trafficked into the EU via seaports are at all-time high with

unprecedented levels of cocaine being seized in the ports of Antwerp (443 tonnes) and Rotterdam (181 tonnes). Recent fluctuations in cocaine seizures suggest a waterbed effect where organised criminal groups might be shifting operations to less restrictive routes. In addition, **criminal groups exploit technological and AI developments for optimising drug trafficking operations** and securing communication over encrypted channels. Increased drug sales on encrypted online platforms and mainstream social media make content moderation challenging for platforms ultimately limiting law enforcement efficient investigation and prosecution of drug-trafficking. Meanwhile, European drug producers and traffickers are closely involved with **international criminal networks** in particular from Latin America, which are expanding their trafficking routes to smuggle drugs into the EU.

In parallel, concern is growing over the health implications of the increased availability and diversity of illicit drugs across the EU, marked by **potent new synthetic drugs and synthetic opioids**, and from high cocaine purity. What is more, **complex drug use patterns are emerging**, often driven by the combination of opioids and stimulants, which increase the risk of drug-induced deaths and other health risks and create new challenges for demand- and harm-reduction services. Cocaine use has risen, including among vulnerable populations, while the potency of cannabis, the most widely used illicit drug, is increasing, leading to more reports of adverse health effects.

II. Evaluation of the 2021-2025 EU drugs strategy and action plan

EFFECTIVENESS

On drug supply reduction, the evaluation finds that since 2021, the Strategy and Action Plan might have contributed to:

- Some progress in **tackling drug organised crime** (priority 1) linked to the reinforced operational support provided by Europol and the enhanced **cooperation and increased exchange of information** on drug related operations between law enforcement, judiciary and customs authorities as well as EU agencies, mainly Europol, Eurojust and EUDA.
- Progress in **detecting drug trafficking and tackling exploitation of logistical hubs** (priorities 2 & 3) particularly in EU ports, as major entry points for cocaine trafficked into the EU. However, the evaluation does not conclude a direct impact of this achievement to the strategy and action plan alone but to the EU roadmap which boosted the fight against drug trafficking and organised crime with its action-oriented focus, mainly via the EU Ports Alliance.

Notwithstanding these efforts, trends during the evaluation period show drug seizures have kept rising but availability, price and purity of illicit drugs on the market appears not diminished. Recent figures of a drop in seizures in major EU seaports do suggest supply reduction efforts are causing a shift in modus operandi. The strategic framework has therefore not fully achieved tackling drug trafficking and its different distributions channels, nor the production of drugs and precursors, including the generated waste, which appears to be increasing (priority 4).

On demand reduction and harm reduction, the Strategy and Action Plan have contributed to some extent to **promoting public health and protecting the wellbeing of society and individuals**, through measures on drug prevention, treatment and access to health services for

all. In practice however, the effective contribution to these objectives remains uneven across Member States due to inconsistent prioritisation and implementation of measures, and measuring the impact on society is difficult due to the limited data available.

The strategy and action plan might have steered national drug strategies to reinforce measures to **reduce drug demand** across Europe:

- Through expanded evidence-based prevention, awareness-raising and improved treatment services, yet their quality and effectiveness vary widely across countries.
- With legislation and policies on voluntary and non-discriminatory access to treatment. In practice, however, services addressing drug-related problems and gender-based violence often operate in isolation and women still face significant barriers to accessing gender-responsive drug treatment and care services.
- In addition, the European Drugs Agency has enhanced support through initiatives that make reliable information on prevention more accessible to those who need it.

Despite these efforts, Member States still face challenges in fully realising the goals of the action plan due to underdeveloped prevention infrastructures, uneven access to treatment services, limited resource allocation, and insufficient integration between social, mental health, and drug treatment systems. In addition, available data on drug use suggests cannabis use among young adults (15-34) remains stable, while the use of cocaine is on the rise.

The Strategy and Action Plan reinforced the focus on **addressing drug harms**:

- This prioritisation has enriched policy and political discussions on harm reduction and helped produce human-centred national and international policies on drugs.
- At EU level, the increased monitoring and rapid response to the emergence of new psychoactive substances, with the support of the EU early warning system has contributed to this area. With its new mandate, the EUDA new network of forensic and toxicological laboratories should foster information exchange and facilitate further effective EU-level responses to emerging new substances and other security and health risks emerging in the EU drug market.

Nevertheless, the action plan had a limited impact on access to harm reduction services intended to reduce fatal overdose across the EU. In addition Member States still operate very differently as regards their approach to health in prison settings, and there is very limited data on substance use and mental health in prisons.

As regards the cross-cutting themes, the strategy and action plan might have contributed to promoting **international cooperation on drugs** with non-EU countries and regions through political dialogues and technical support from EU-funded programmes and EU agencies. However, the action plan misses to identify key operational actions for improving cooperation with non-EU countries most affected by drug-trafficking. The EU roadmap reinforced this operational focus for key regions including Latin America for the cocaine route and China for precursors trafficking, taking further steps on intelligence-sharing and law enforcement capacity-building with these partners.

The strategy and action plan might have influenced measures to boost **research, innovation and foresight** in the EU and Member States, with some progress in monitoring new drug trends and developing detection technologies. EUDA's contribution to this objective has been reinforced with greater capacity to collect and analyse data on emerging drug trends, consumption patterns and market risks. Europol's EU Innovation Hub for Internal Security contributes to research and operational strategies for disrupting drug trafficking networks. However, assessing effectiveness at national level remains challenging as Member States do not collect nor report statistics on the impact of their interventions in a systematic manner.

As regards coordination, the Strategy and Action Plan supported Member States' national policies across supply, demand and harm reduction pillars and enhanced dialogue at EU level mainly in the Horizontal Drugs Group of the Council. They also helped ensure a united EU voice on drug policies at international forums, such as the Commission on Narcotic Drugs, and in dialogues with countries and regions outside the EU.

EFFICIENCY

The **Strategy's efficiency** is affected by the evolving drugs market influenced by new production trends (new psychoactive substances), changing use patterns, the geopolitical instability, the exploitation of technologies and encrypted communications and new drug trafficking routes. Beyond external factors, the efficiency of the Strategy is largely affected by the limited indicators on costs and public expenditure related to drug policy combined with the limited reporting of data by Member States. The unclear ownership of actions coupled with the action's broad approach, undermines implementation and weakens efficiency of the framework.

There has been increased EU funding for EU agencies and support for research and security under Horizon Europe and ISF programmes, in addition to international cooperation programmes. Yet, public consultation suggests funding remains insufficient for harm reduction services and civil society projects. As regards benefits, the Strategy supported law enforcement coordination and information-sharing in the dismantling of organised criminal drug networks and reinforced the need for evidence-based prevention and harm reduction initiatives.

COHERENCE

The Strategy and Action Plan provide a **coherent** framework aligned with EU, national and international policies and legislations. Further integration of operational responses to organised drug crime is needed to respond to emerging trends. EU health policies are not fully consistent with EU drug policies, stronger links could be forged on drug-related mental health and gender-sensitive approaches to drug-related harms. At the national level, most Member States align their drug strategies with the EU framework.

RELEVANCE

The EU Drug Strategy remains **relevant** in addressing both current and future drug-related challenges at EU level and across Member States. Stakeholders believe that the Strategy's

comprehensive approach adequately addresses drug policy needs. On the other hand, the study shows that the Action Plan often lacks clear outputs and attribution of responsibilities, making it difficult to monitor specific implementation and assess impact and results.

EU ADDED VALUE

Drug policy is inherently complex, intersecting with security, health and socio-economic policies; it requires coordination at regional, national and international levels. Addressing drug-related challenges at EU level has demonstrated significant **added value**, steering national drug strategies and promoting the EU approach to drugs with “one voice” at international level; delivering results that individual Member States could not achieve alone.

CONCLUSIONS AND LESSONS LEARNT

The evaluation finds that the strategy and action plan have had a moderate impact on achieving its general objectives to reduce supply demand and harm. In terms of scope and narrative, the strategic priorities and actions are found overly general and lack a result-oriented approach. In terms of measurable results, the evaluation found important limitations due to data availability and weak indicators. As regards implementation and accountability, clarity on allocation of responsibilities and accountability for monitoring measures implemented at national level is needed. Therefore, the future strategic framework should be sufficiently operational, encompassing clear and tangible actions with a manageable number of priorities and realistic targets; and backed by reliable data that needs systematic collection, reporting and monitoring.

The evaluation also finds that there is a need to look at achievable objectives, as well as adaptive policies to address the evolving trends of drug market. Considerations should be given for better-defined indicators and timely data collection and reporting by Member States, with support of EUDA. Concrete proactive measures are needed to tackle the organised drug crime, disrupt their activities and tackle their infiltration into EU’s supply chain using violence and corruption. It would be important to further explore private-public cooperation, including international cooperation. Further capacities to detect new drugs involve continued support of national and EU early warning systems and a unified approach to standardise data collection. Reducing drug demand still meets challenges in prevention infrastructures, uneven access to treatment services and limited resources; while national efforts in addressing drug harm could expand in service interventions including drug consumption rooms and take-home naloxone to mitigate challenges posed by synthetic drugs, opioids and polysubstance use.