



FULL ANALYSIS

# SDG7 BACKSLIDING

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# Context & Objective

In the last decade we have made notable progress towards SDG7 and the energy transition. Despite these efforts, all indicators point toward us missing the 2030 goal. In 2021, Energy Compacts were launched at the High-Level Dialogue on Energy to raise the bar on SDG7 ambition and hold a mirror to proponents on where they are with respect to their public commitments.

This study intends to identify backsliding on ambition and action with the following research objectives:

1. Identify and categorize the various forms of backsliding at a member state level
2. Analysis of recent trends on progress made towards SDG7 and categorizing member states based on the national context and outlook going ahead
3. Defining calls to actions and avenues ahead

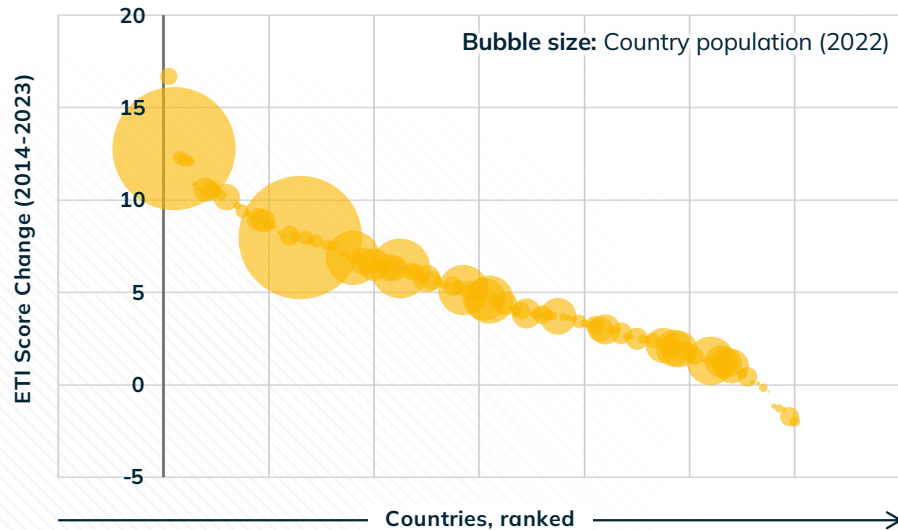
The analysis follows a mixed quantitative-qualitative approach and has been conducted internally at Sustainable Energy for All. The intended audience are high-level stakeholders and member states to commit to higher ambition and action towards SDG7.



# Road to SDG7



- As a collective, there has been a **net positive trend towards SDG7** and energy transition **in the last decade** (2014-2023).
- **Only 7 out of 120 countries**, with a combined <1% share of world population, **score negatively** in the Energy Transition Index
- **All SDG7 key indicators** have shown a positive trend

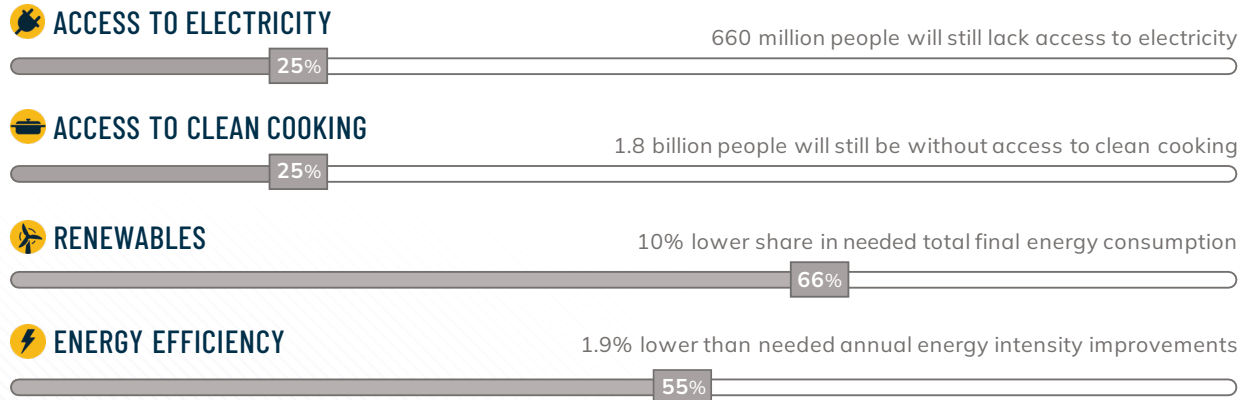


INDICATOR	2015	LATEST YEAR
7.1.1 People without access to electricity	957.5 million	↓ 685 million
7.1.2 People without access to clean cooking	2.7 billion	↓ 2.1 billion
7.2.1 Share of total final energy consumption from renewables	16.7%	↑ 18.7%
7.3.1 Energy intensity measured as a ratio of primary energy and GDP	4.9 MJ/USD	↓ 4.6 MJ/USD
7.a.1 International financial flows to developing countries in support of clean energy research and development and renewable energy production, including in hybrid systems	12.3 USD Billion	↑ 15.4 USD Billion
7.b.1 Installed renewable energy-generating capacity in developing and developed countries	250 watts per capita	↑ 424 watts per capita

**Note:** Developed by World Economic Forum, the Energy Transition Index (ETI) benchmarks 120 countries on energy system readiness for transformation.

# Road to SDG7

## SDG7 PROGRESS OUTLOOK FOR 2030



### ACHIEVING SDG7 BY 2030

100%

■ Shaded section represents levels of advancement by 2030 under current scenario against Net Zero by 2050 and SDG7 by 2030 aligned scenario developed by IEA

**Note:** Baseline considers, by 2030, renewables share in total final energy consumption reaches 22.7% and annual improvements in energy efficiency reaches 2.4% .

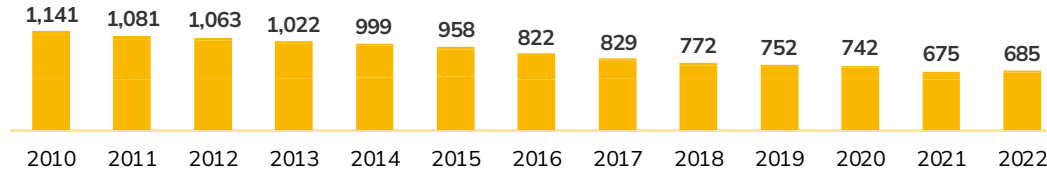


- The last decade has seen notable progress with **all key SDG7 indicators improving** between 2014-2022.
- However, we are not on track to achieve SDG7 by 2030.
- According to the Tracking SDG7 Report, at our current trajectory, we would be **missing all SDG7 targets**.

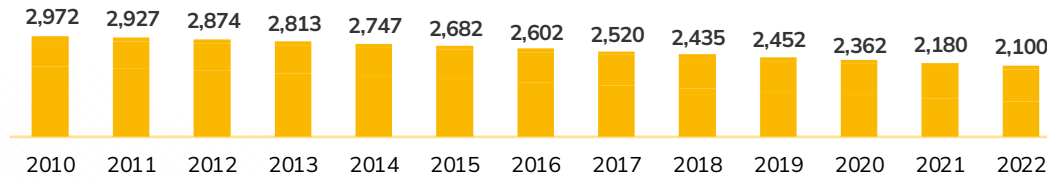


# Road to SDG7 – Global Regression

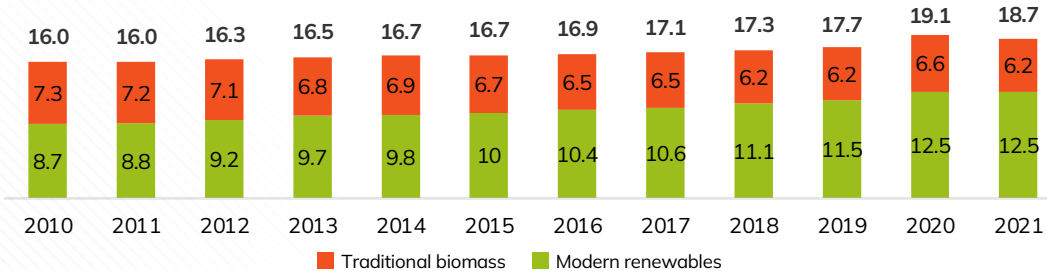
**GOAL 7.1.1: Universal Electricity Access** million of people without access



**GOAL 7.1.1: Universal Access to Clean Fuels & Technologies for Cooking** million of people without clean cooking access



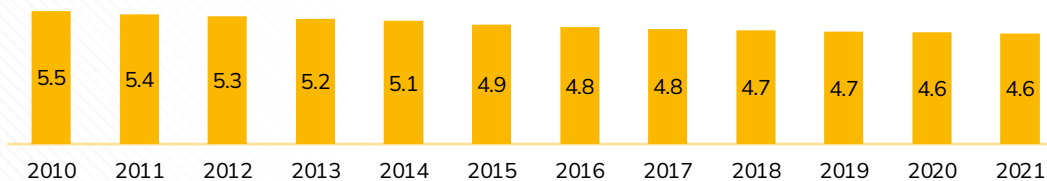
**GOAL 7.2 A: Increase Share of Renewable Energy (RE)** % share energy consumption from renewables



**GOAL 7.2 B: Increase Share of Modern RE,** % share energy consumption from non-biomass RE

**GOAL 7.3: Double Rate of Energy Efficiency Improvement**

rate of improvement of global primary energy intensity

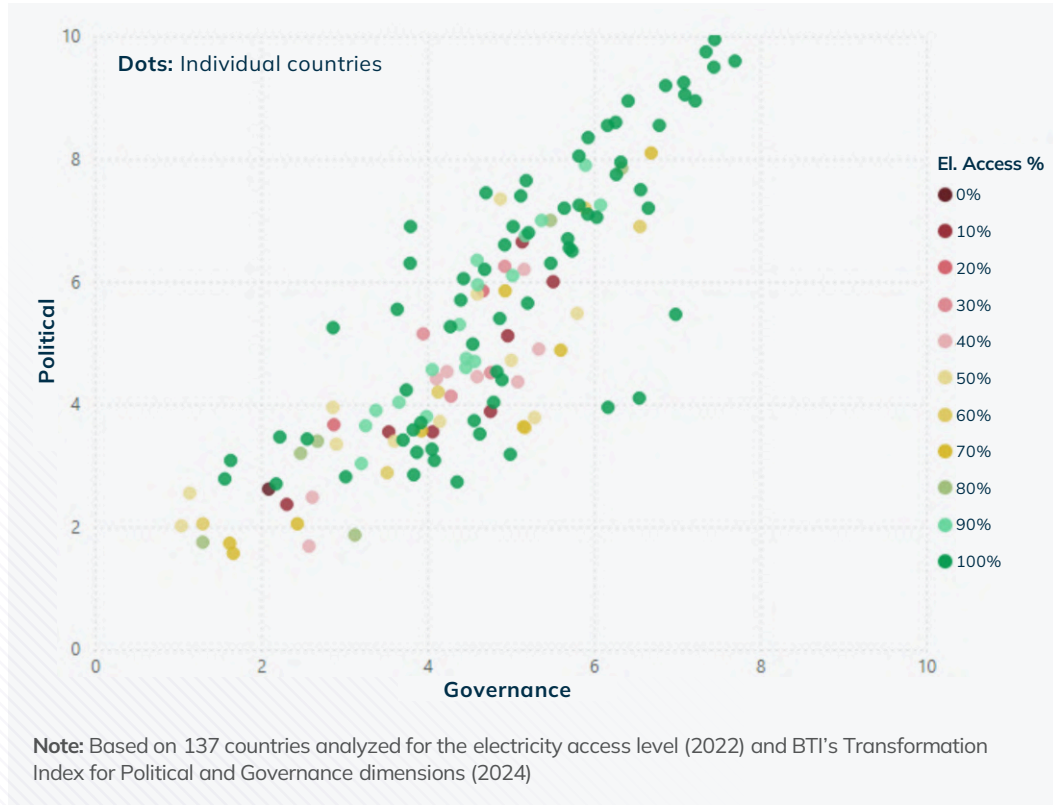


- The latest data in the Tracking SDG7 2024 report show **global regression in SDG7.1.1 and 7.2**, while **no material changes in SDG7.3** and **minimal improvement in SDG 7.1.2**.
- All SDG7s have shown a ‘Not-on-Track’ trend for years, but **this first global backsliding evidence since 2010 is alarming**.
- It is an **urgent necessity to reverse this trend by identifying countries that need support and to take action to achieve SDG7 by 2030**.

**NOW IS THE TIME  
TO DOUBLE DOWN,  
NOT BACK DOWN**



# Why is it important to engage countries on SDG7?



- Progress on SDG7 indicators strongly correlate with metrics used to measure countries' political and governance structures.
- In 2024, more people will go into elections than ever before in the history of democracy.
- Since 2021, multiple instances of backsliding on SDG7 ambition and action have been observed. They weaken political signals, destabilize institutions and ultimately threaten us to go beyond the 1.5°C threshold.



With SDG7 on the brink, **now is the time to double down, not back down.**

# 5Ps of Backsliding

**!** THE STORY OF COLLECTIVE ACTION HAS BEEN  
**TWO STEPS FORWARD, ONE STEP BACK**



**POLITICS**  
Neglecting climate science



**PLEDGES**  
Revoked, diluted or ignored



**PATHWAYS**  
Leaving un-defined and un-actionable



**PHASE-OUT**  
Sustaining dependence on fossil fuels



**PROGRESS**  
Ultimately falling short of SDG7

**7 AFFORDABLE AND CLEAN ENERGY**  
**GOAL AT RISK**





# SDG7 Country Analysis: Background, Objectives and Analytical Framework Concept

## Background & Objectives of the Analysis

The latest Tracking SDG7 2024 report data show that SDG7.1.1, 7.1.2, and 7.2 regressed for the first time since 2010, while SDG7.3 also stagnated from the previous year. With this global background, the aim of this analysis is to find countries that are backsliding on SDG7 progress, to identify those which may require additional support, as well as those that have made notable progress and lessons learned from them.

## Basic Analytical Framework Concept

- The analytical framework tries to establish a systematic and replicable methodology for repeated analysis, utilizing well-established and reliable indicators.
- The analysis focuses on 1) **recent trend** - each country's progress / backsliding and its magnitude in recent years, examining changes made in relevant indicators, and 2) **enabling framework** - the country's policy and regulatory enabling environment progress, in addition to future direction, by investigating political and policy changes regarding implementation of policy and planning toward SDG7 and climate change goals.

*Both quantitative and qualitative analysis are employed but the former takes priority.* →

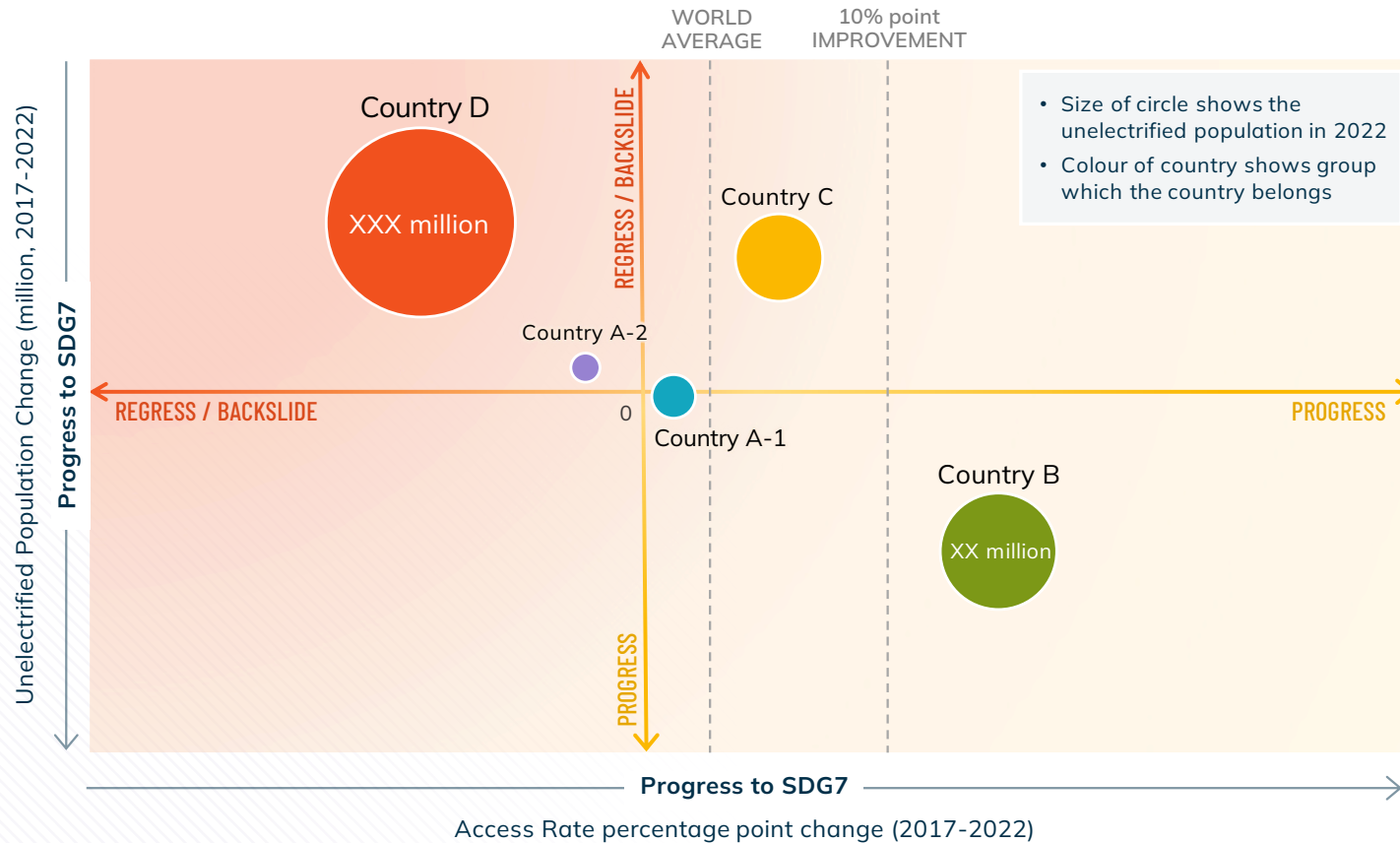
## Quantitative Analysis – quantifying recent trend / progress:

- Analysis of recent trend / progress uses quantitative data and evidence of selected official indicators of SDG7.
- RISE indicators for relevant SDG7 areas are used as primary data for examination for enabling environment analysis. In addition, especially for the countries that RISE scores are not available, other available quantitative indicators / index, such as Energy Transition Index by the World Economic Forum and BTI Index are used to assess the enabling environment framework.

## Qualitative Analysis – checking enabling framework recent changes and planned / intended changes for future direction and speeds

- Where it is difficult to examine the conditions with quantitative assessment only, qualitative examination is also employed, especially to assess enabling environment.

# SDG 7.1.1 Analytical Framework – Country Grouping / Mapping Concept



## LEGEND

### Group A: Last Mile & Reversal

- Last mile
- Reversal

### Group B: Strong Progress

- Good Enabling Environment
- Weak or Unknown Enabling Environment

### Group C: Slow Progress

- Good Enabling Environment
- Weak or Unknown Enabling Environment

### Group D: No Material Change or Backsliding Progress

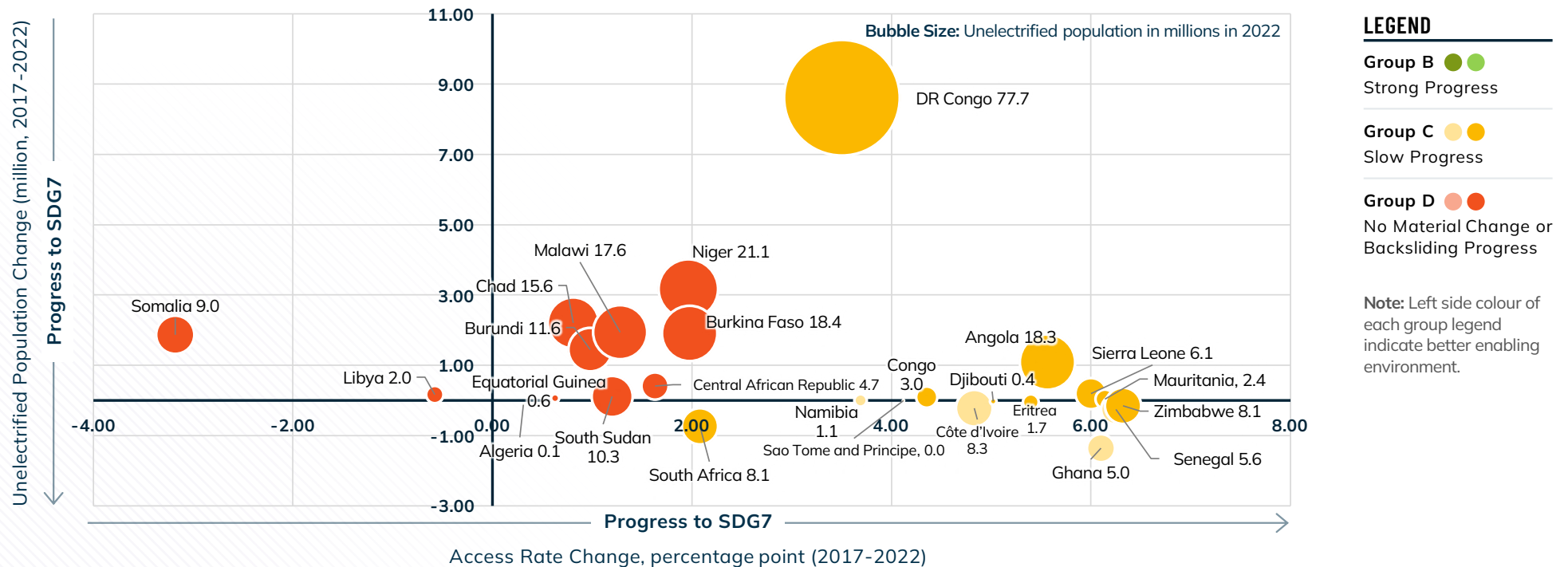
- Good Enabling Environment
- Weak or Unknown Enabling Environment

# SDG 7.1.1 – 49 African countries with unelectrified population



10 countries show no material changes or backsliding, all with weak enabling environments.

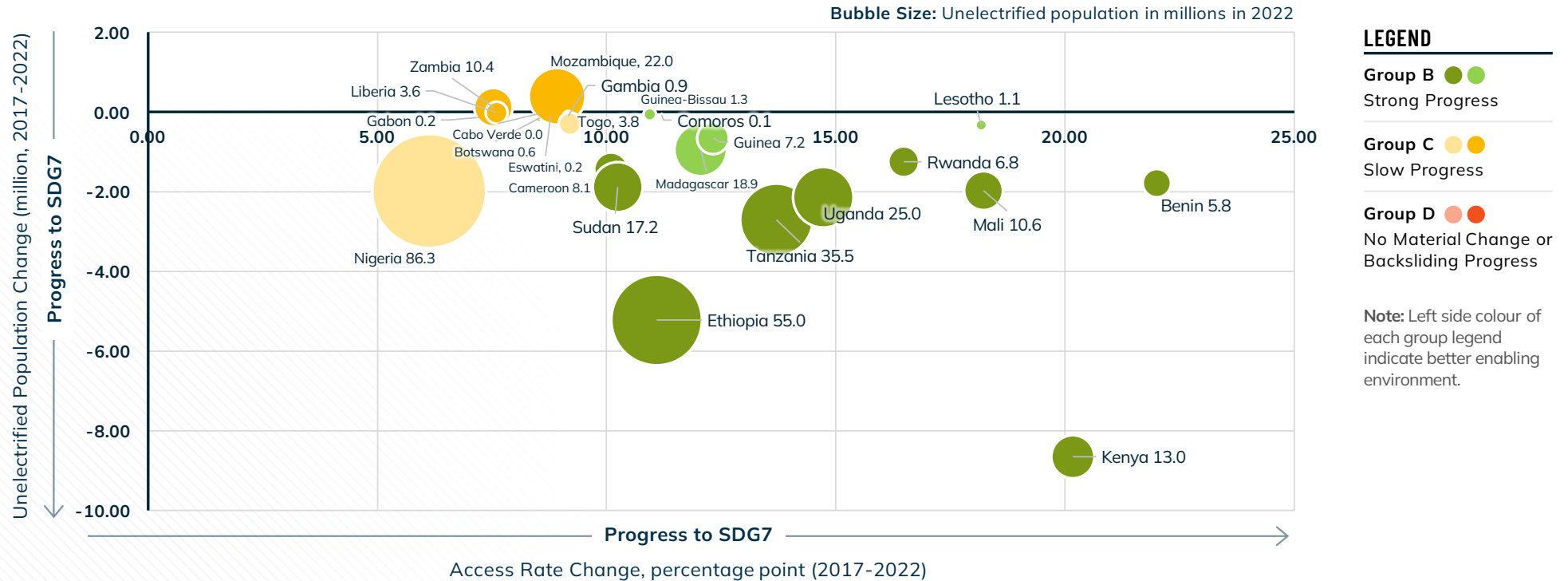
But only 2 (Somalia and Libya) are reducing access rates while increasing unelectrified population. Other 8 countries show no material changes in access rate while increasing unelectrified population.



# SDG 7.1.1 – 49 African countries with unelectrified population



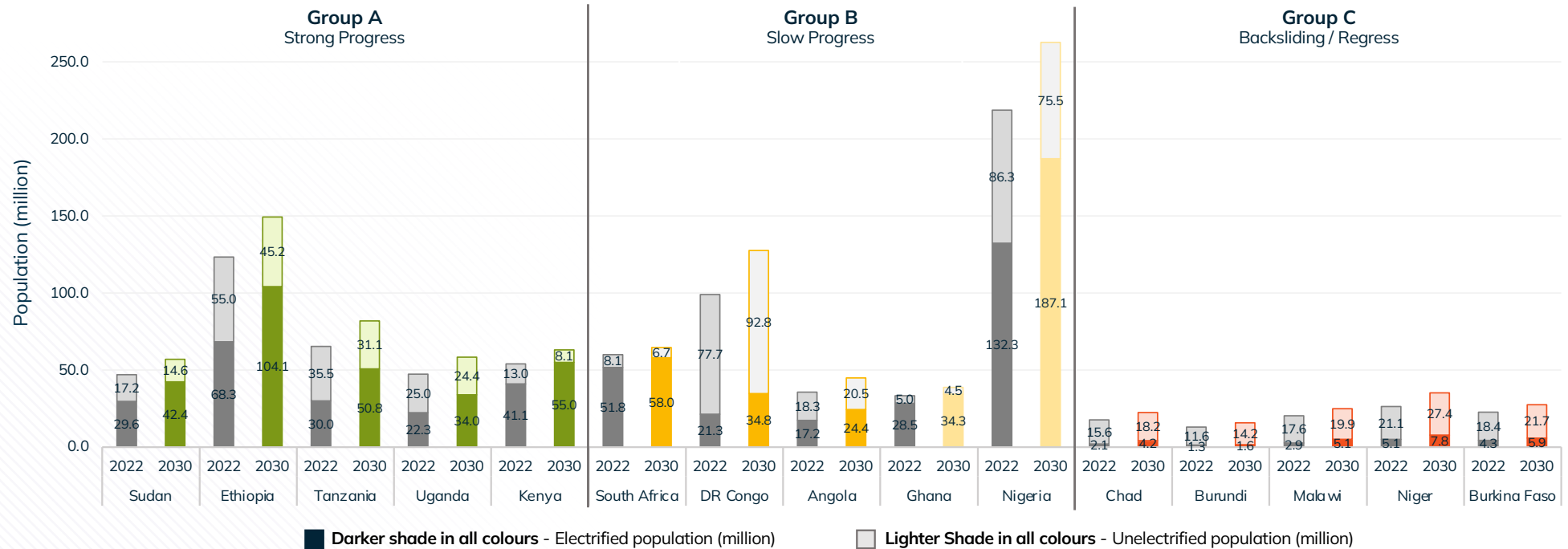
- 14 countries show strong progress, and 9 of them have good enabling environments.
- 22 countries are progressing only slowly. Enabling environments vary in this group, as 10 of them show good environments.



# SDG 7.1.1 - Electricity access and population growth

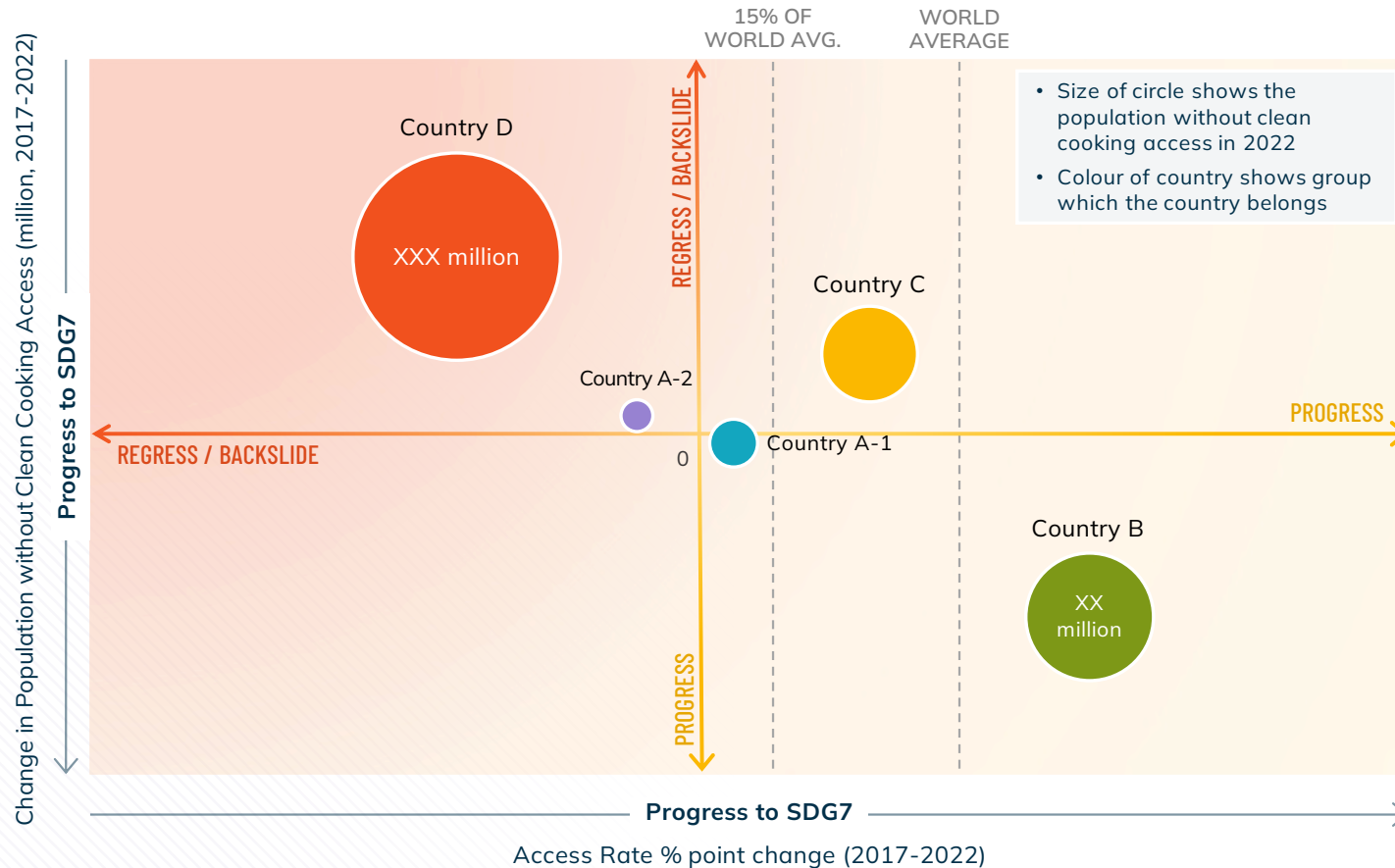
- Regardless of current status, **unelectrified population levels will stay similar or increase due to population growth by 2030** even with increased electrified population.
- A focus on the **most populous countries has a higher impact** on SDG7.1.1, but **smaller countries should not be left behind**.

COMPARISON AMONG POPULOUS AFRICAN COUNTRIES BY SDG7.1.1 PROGRESS GROUP TYPE



SOURCE: SEforALL Analysis DATA SOURCES: Tracking SDG7 2024 Datasets; World Bank Development Indicators (2024)- Population, total, World Bank Data Bank (2024) Population projections and estimates

# SDG 7.1.2 Analytical Framework – Country Grouping / Mapping Concept



## LEGEND

### Group A: Last Mile & Reversal

- Last mile
- Reversal

### Group B: Strong Progress

- Good Enabling Environment
- Weak or Unknown Enabling Environment

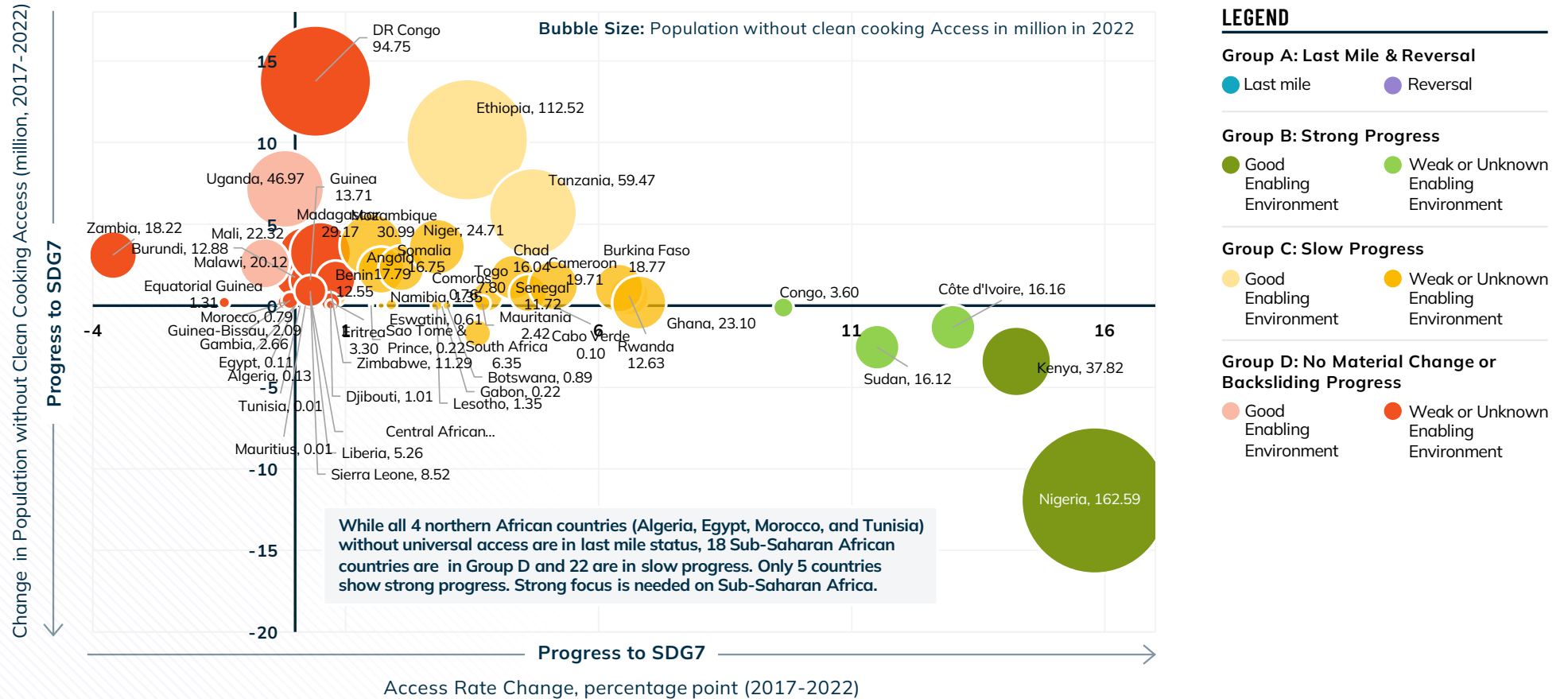
### Group C: Slow Progress

- Good Enabling Environment
- Weak or Unknown Enabling Environment

### Group D: No Material Change or Backsliding Progress

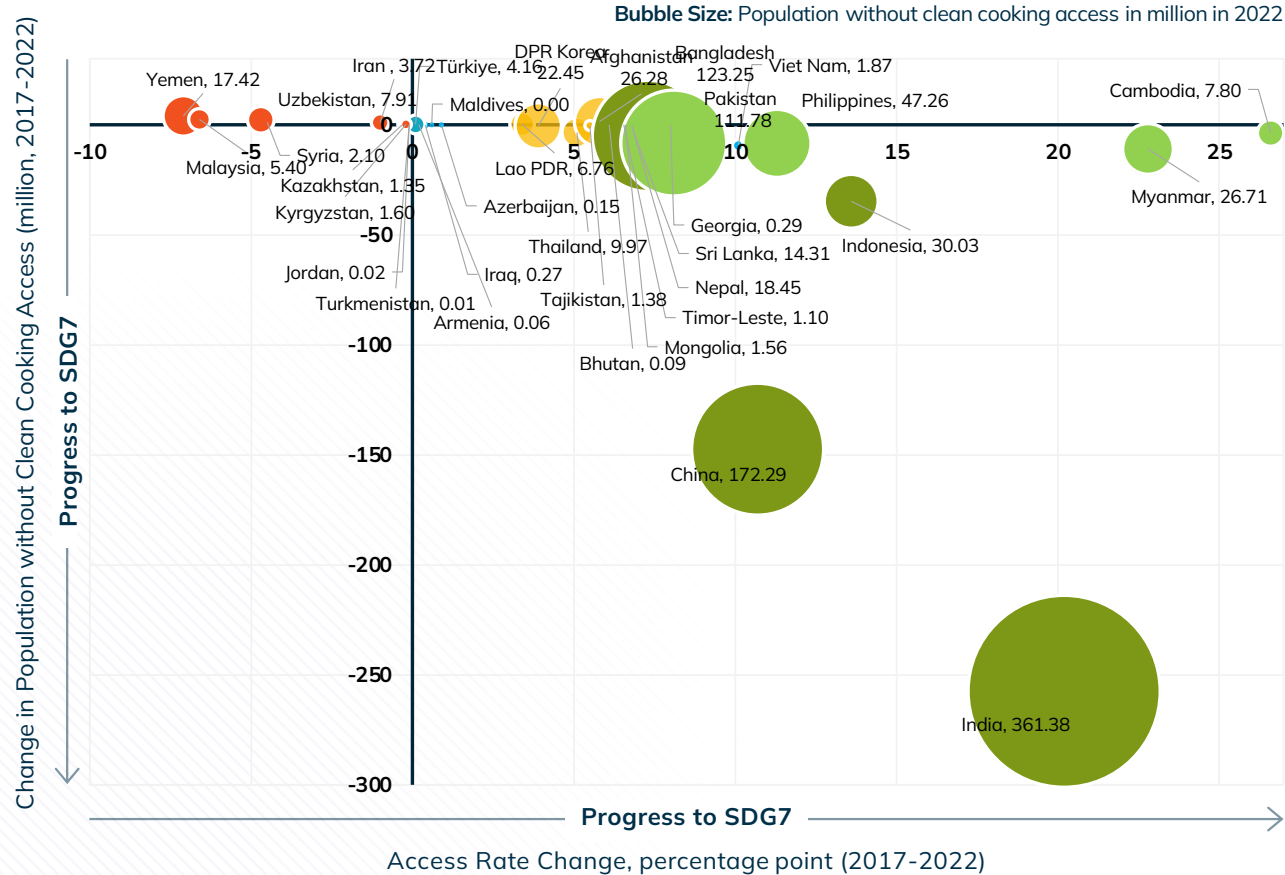
- Good Enabling Environment
- Weak or Unknown Enabling Environment

# SDG 7.1.2 - 51 African Countries with Population without Clean Cooking Access



SOURCE: SEforALL Analysis | DATA SOURCES: WORLD BANK / ESMAP Tracking SDG7 Database, 2024; World Bank / ESMAP RISE indicator country data 2022; BTI Transformation Index (2024); United Nations Energy Compact Registry

# SDG 7.1.2 - 34 Asian Countries with Population without Clean Cooking Access



## LEGEND

### Group A: Last Mile & Reversal

● Last mile ● Reversal

### Group B: Strong Progress

● Good Enabling Environment ● Weak or Unknown Enabling Environment

### Group C: Slow Progress

● Good Enabling Environment ● Weak or Unknown Enabling Environment

### Group D: No Material Change or Backsliding Progress

● Good Enabling Environment ● Weak or Unknown Enabling Environment

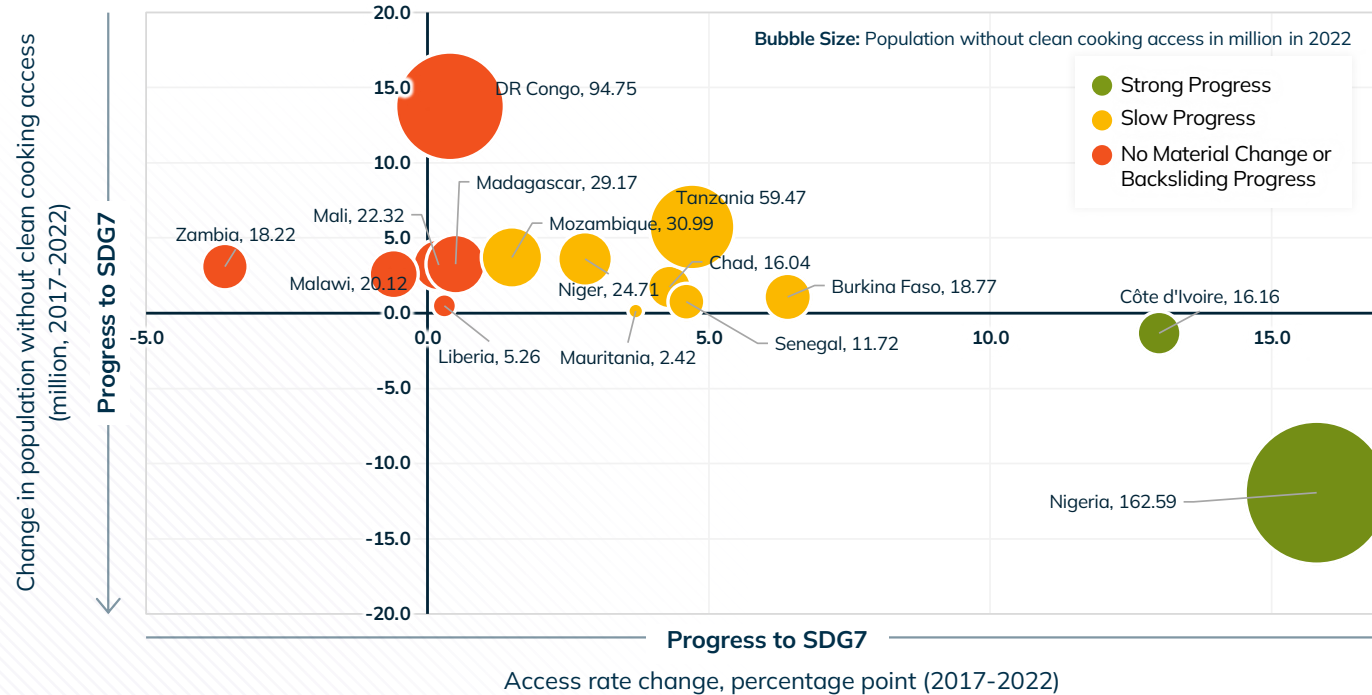
- Remarkable progress made by India, China and Indonesia in reduction of population without access stands out from the rest, although they still have substantial population who needs the access.
- Asia shows much stronger improvement trend than Africa in general. While 10 countries are in last mile territory, 8 countries show strong progress. 10 countries progressed slowly. The remaining 5 countries showed no material change or backsliding trends.
- Sub-regionally, 9 out of 10 Eastern and Southeastern Asian countries showed progress, while only one country (Malaysia) did backslide.



# SDG 7.1.2 - Clean cooking access and regional imbalance

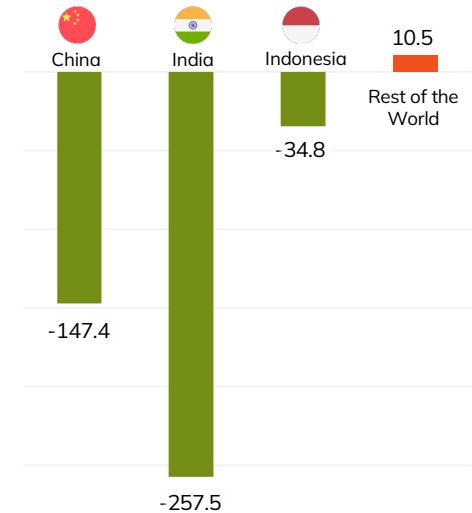
- If we exclude clean cooking progress made in three countries – India, Indonesia and China – **the number of people without access has increased** since 2017.
- In Sub-Saharan Africa, only 5 countries show strong progress, with 22 showing slow progress and 18 regressing.

### CLEAN COOKING ACCESS PROGRESS BY SELECTED 15 AFRICAN COUNTRIES

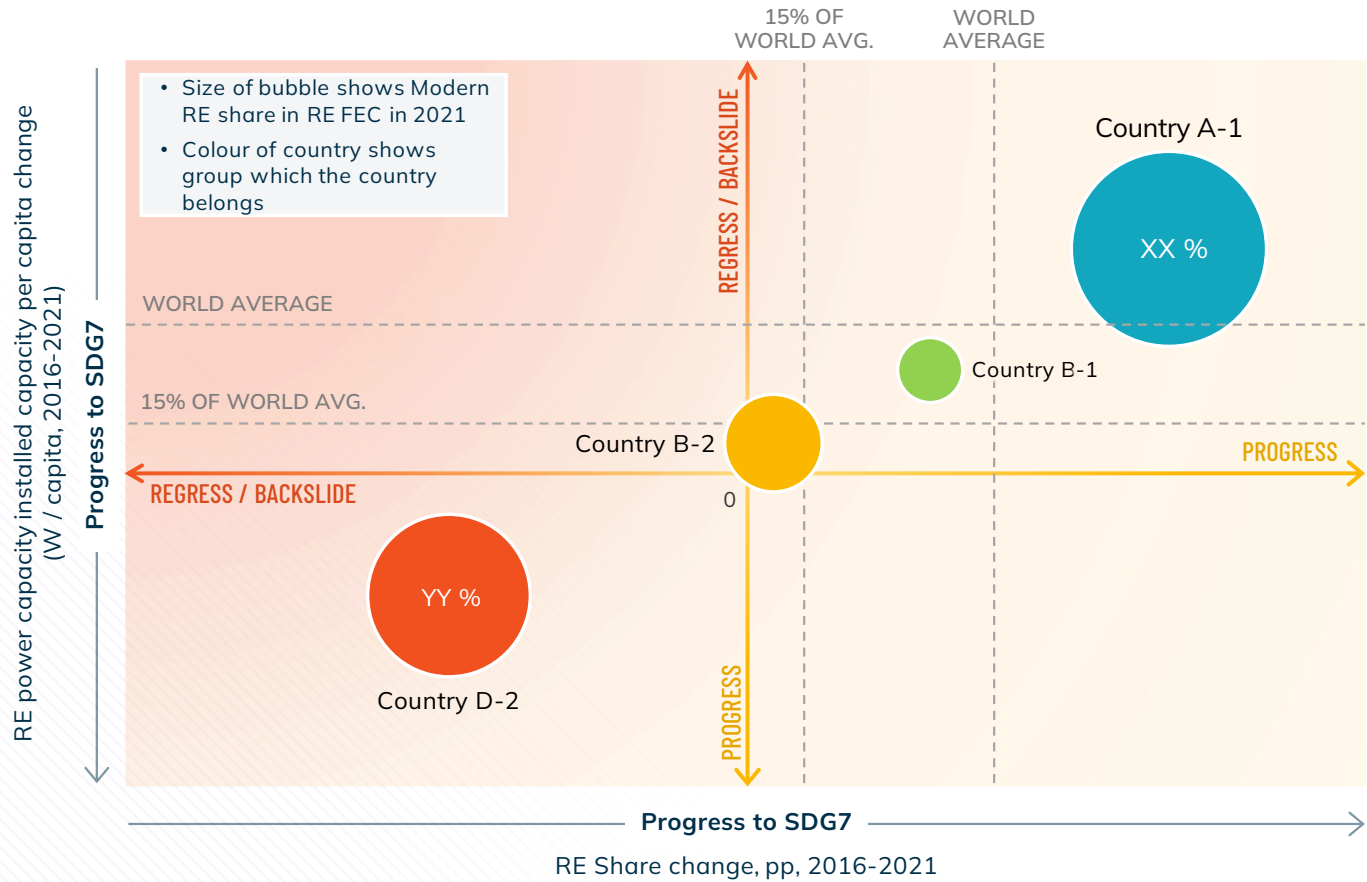


### THREE ASIAN COUNTRIES VS THE REST

Change in Population without Clean Cooking Access (million, 2017-2022)



# SDG 7.2 Analytical Framework – Country Grouping / Mapping Concept



## LEGEND

### Group A: Last Mile & Reversal

- Good/Moderate Enabling Environment
- Weak Enabling Environment
- Unknown Enabling Environment

### Group B: Strong Progress

- Good/Moderate Enabling Environment
- Weak Enabling Environment
- Unknown Enabling Environment

### Group C: Slow Progress

- Good/Moderate Enabling Environment
- Weak Enabling Environment
- Unknown Enabling Environment

### Group D: Backsliding

- Good/Moderate Enabling Environment
- Weak Enabling Environment
- Unknown Enabling Environment

## SDG 7.2 Renewable Energy



- Countries backsliding tend to have **lower Total Final Energy Consumption (TFEC)** per capita and lower income.
- Meanwhile, countries with no material change tend to be **higher income countries**.
- While support for those backsliding needs to be strengthened, **wealthier countries also need to do better**.

### BACKSLIDING (GROUP D) / NO MATERIAL CHANGE (GROUP C) BY TFEC PER CAPITA AND BY COUNTRY INCOME STATUS

	HIGH TFEC PER CAPITA	MEDIUM TFEC PER CAPITA	LOW TFEC PER CAPITA	TOTAL
High income	3 / 14	2 / 9	0 / 1	5 / 24
Upper middle income	0 / 3	9 / 11	8 / 3	17 / 17
Lower middle income	0	0 / 1	27 / 4	27 / 5
Low income	--	--	15 / 5	15 / 5
<b>TOTAL</b>	<b>3 / 17</b>	<b>11 / 21</b>	<b>50 / 13</b>	<b>64 / 51</b>

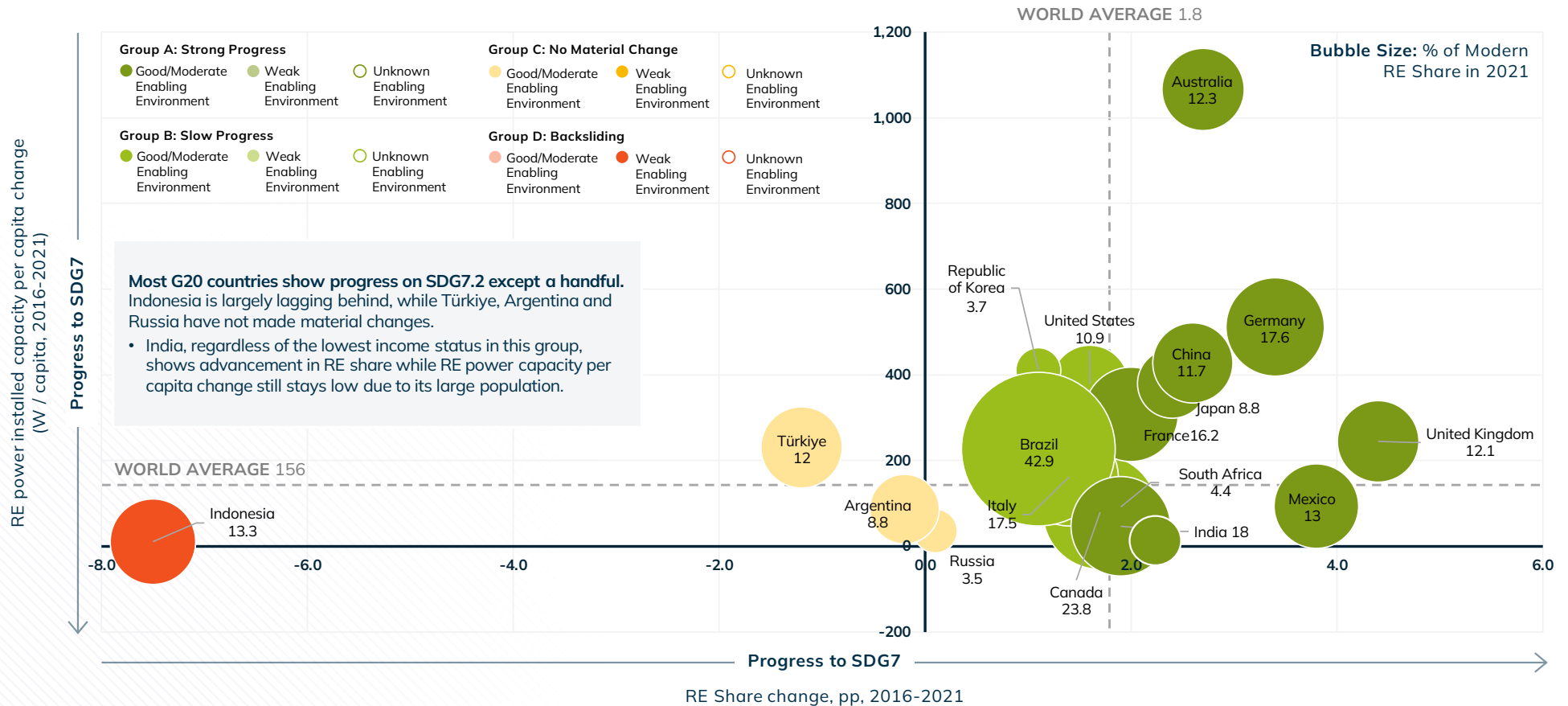
**32% (64 out of 202 countries analyzed) show backsliding, while 24% (51 countries) show no material changes.** Meanwhile 43% (87 countries) show either good progress / advancement or slow progress. This is not an encouraging sign.

- Among 64 backsliding countries, 5 countries are high-income, 17 countries are upper middle-income, 27 countries are lower middle income, and 15 countries are low-income countries.
- Among 51 no-material-change countries, 24 countries are high income, 17 countries are upper middle income, 5 countries are lower middle income, and 5 countries are low income.

SOURCE: SEforALL Analysis

DATA SOURCES: Tracking SDG7 2024 Datasets; World Bank / ESMAP (2022): Regulatory Indicators for Sustainable Energy; BTI (2024) Transformation Index, World Economic Forum (2024), Energy Transition Index; World Bank (2024) World Bank Country and Lending Groups; World Bank Development Indicators (2024) Population total

# SDG 7.2 Deep Dive G20 Countries - Progress on Renewable Energy

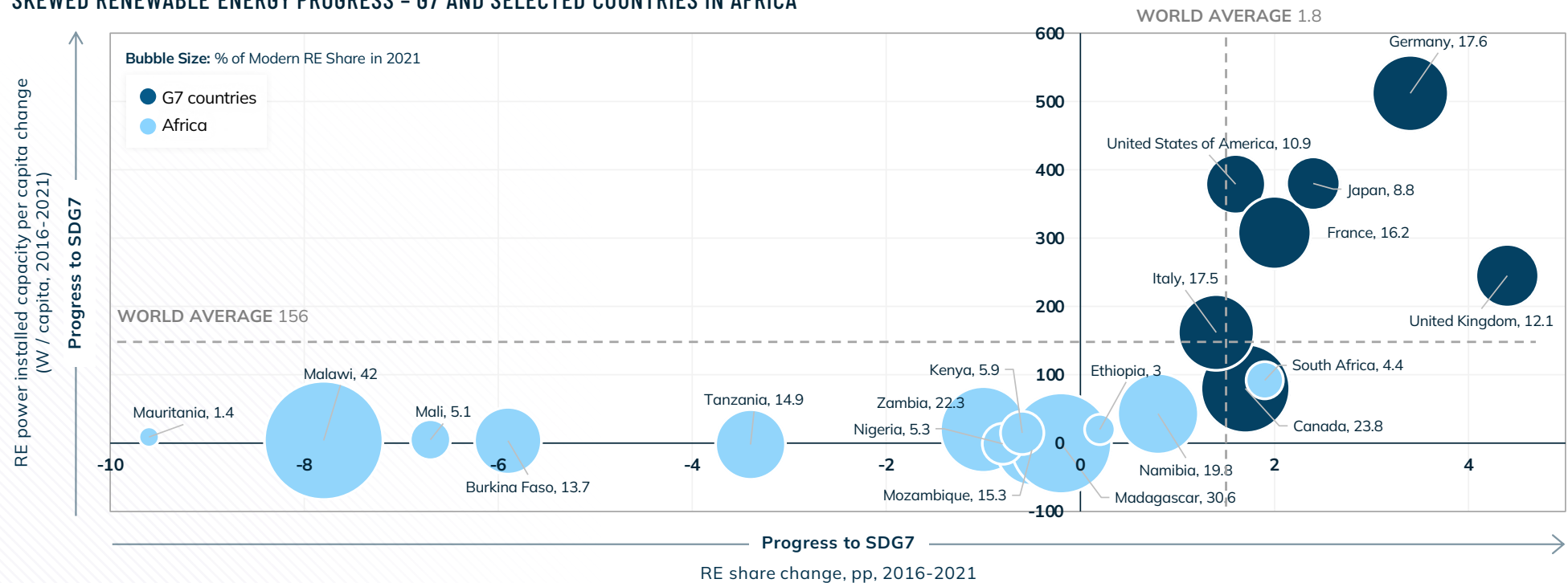


# SDG 7.2 Renewable energy progress and economic imbalance



- Progress is skewed, with wealthier countries making greater progress than lower income and low energy consuming countries. High income countries accounted for 30 of the 53 countries observed to show strong progress on RE.
- At the same time, 15 high income countries, excluding small island developing states (SIDS) with geographical limits, show no material changes or backsliding.

## SKewed Renewable Energy Progress - G7 and Selected Countries in Africa

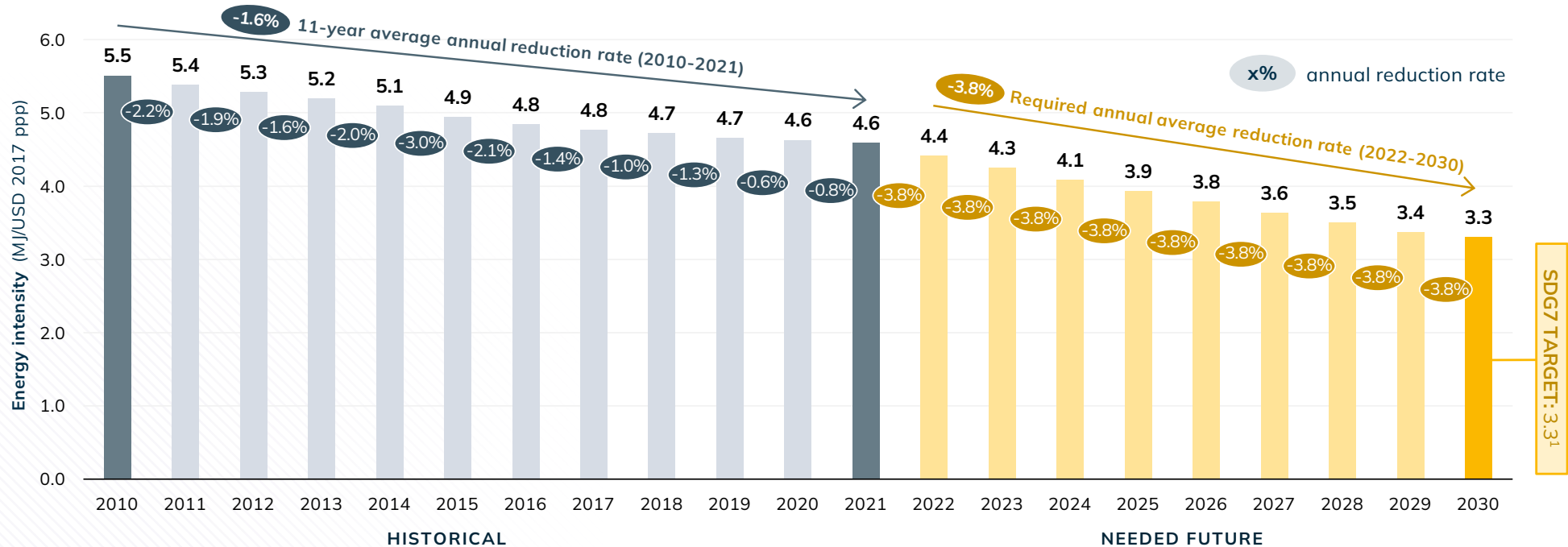


SOURCE: SEforALL Analysis | DATA SOURCES: IEA, IRENA, UNSD, World Bank, WHO (2024) Tracking SDG7 2024 Report Datasets; World Bank / ESMAP (2022): Regulatory Indicators for Sustainable Energy; BTI (2024) Transformation Index, World Economic Forum (2024), Energy Transition Index; World Bank (2024) World Bank Country and Lending Groups; World Bank Development Indicators (2024) Population total

# SDG 7.3 Energy Intensity Reduction – Global Pathway

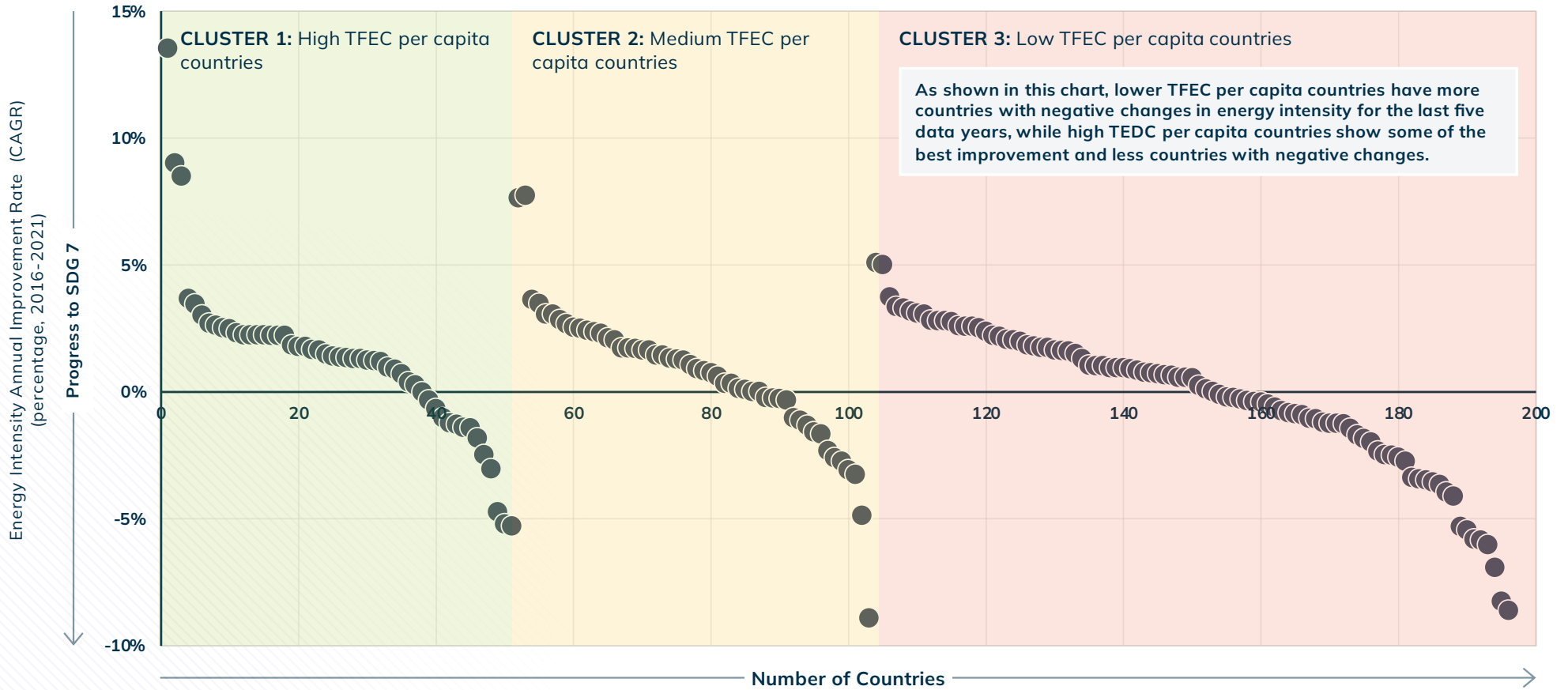


- Energy intensity must reduce on average 3.8% a year to reach the 2030 goal, much more than the 1.6% average annual reduction seen between 2010-2021.
- To account for uneven economic levels and development trajectories across countries, context-specific but holistic solutions are needed to reach the 2030 goal.

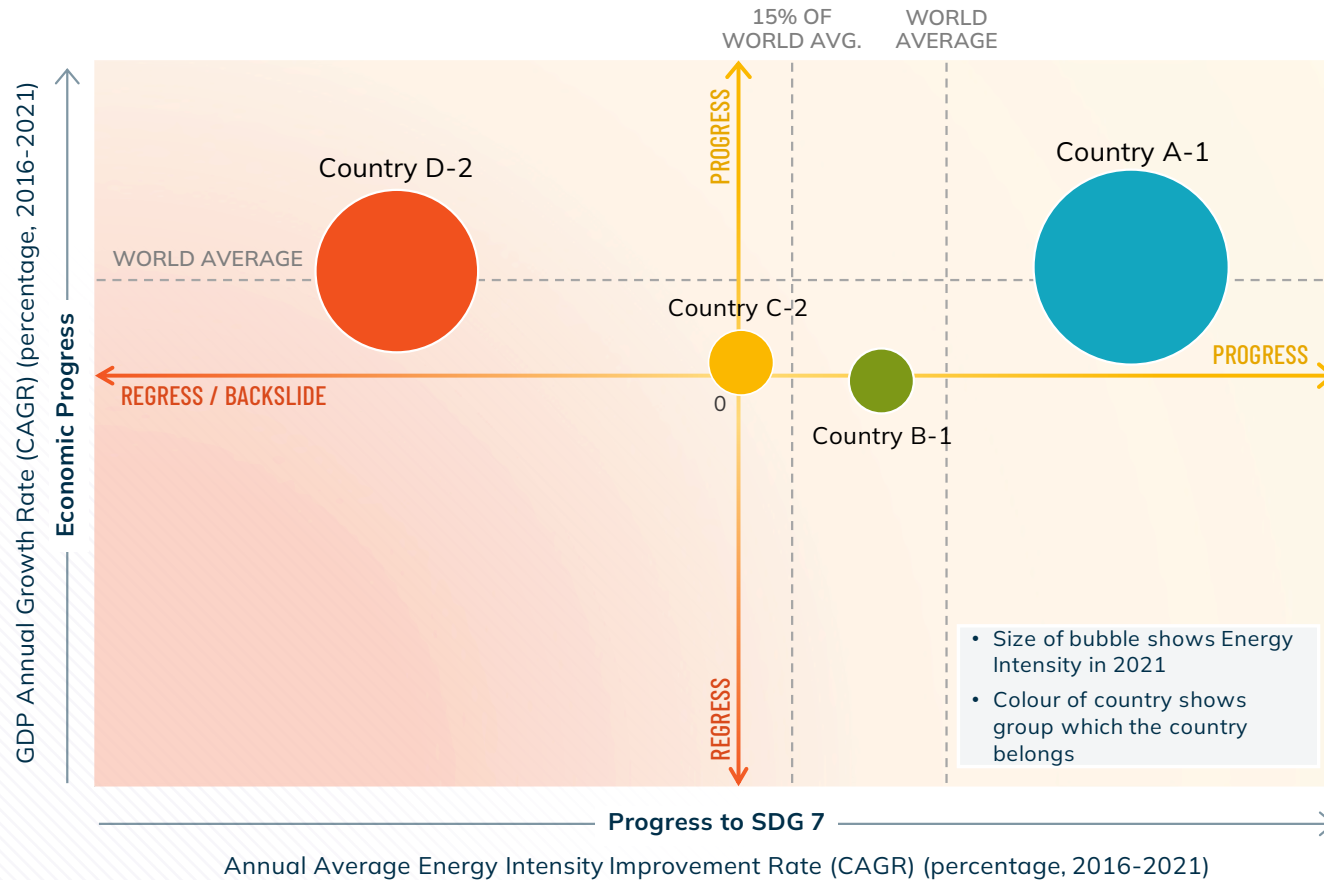


SOURCE: SEforALL Analysis  
 DATA SOURCES: IEA, IRENA, UNSD, World Bank, WHO (2024) Tracking SDG7 2024 Report Datasets;; World Bank Development Indicators (2024) Population total

# SDG 7.3 Energy Intensity Reductions Clustered by Energy Consumption



# SDG 7.3 Analytical Framework – Country Grouping / Mapping Concept



## LEGEND

### Group A: Strong Progress

- Good/Moderate Enabling Environment
- Weak Enabling Environment
- Unknown Enabling Environment

### Group B: Slow Progress

- Good/Moderate Enabling Environment
- Weak Enabling Environment
- Unknown Enabling Environment

### Group C: No Material Change

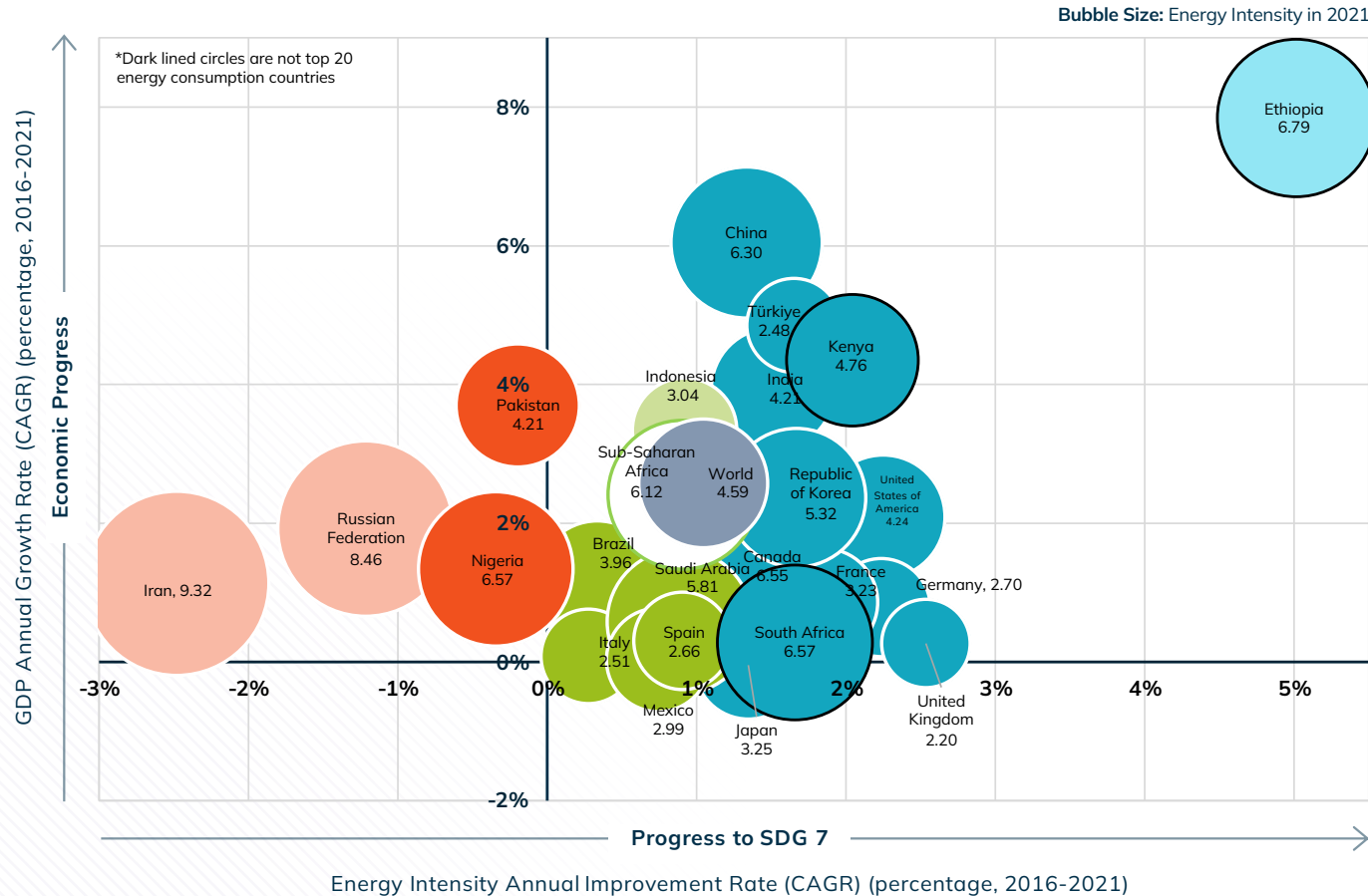
- Good/Moderate Enabling Environment
- Weak Enabling Environment
- Unknown Enabling Environment

### Group D: Backsliding

- Good/Moderate Enabling Environment
- Weak Enabling Environment
- Unknown Enabling Environment



# SDG 7.3 Top 20 Energy Consuming (high impact) Countries with Sub-Saharan Africa



## LEGEND

### Group A: Strong Progress

- Good/Moderate Enabling Environment
- Weak Enabling Environment
- Unknown Enabling Environment

### Group B: Slow Progress

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- Weak Enabling Environment
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### Group C: No Material Change

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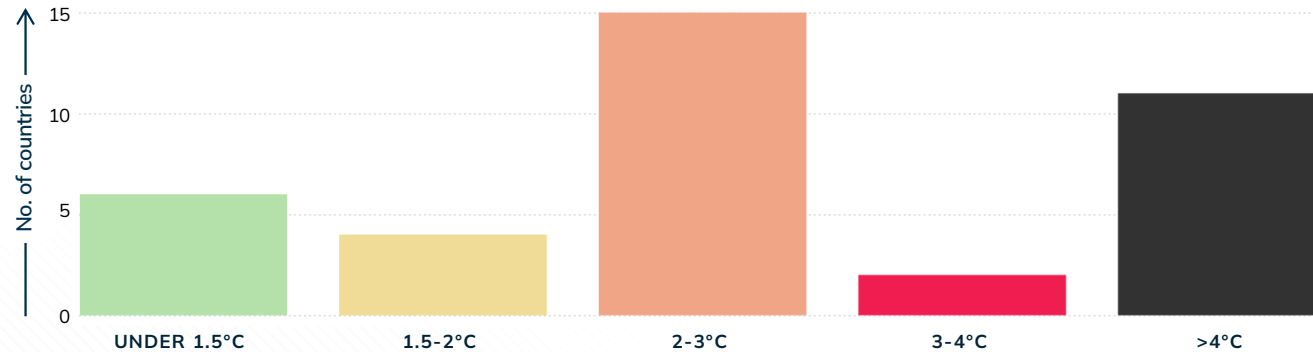
### Group D: Backsliding

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- Unknown Enabling Environment

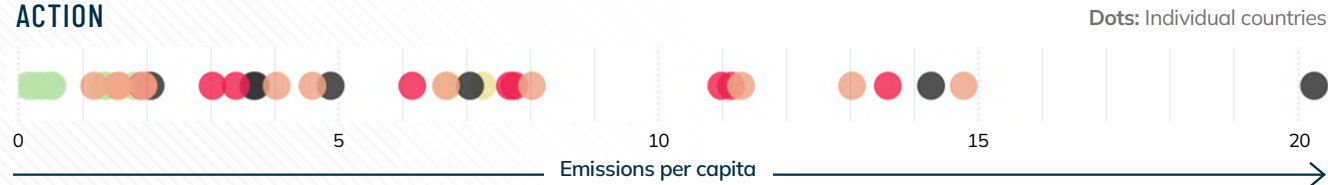
- Majority of top 20 energy consuming countries (16 countries) show progress. 10 countries progressed better than the world energy intensity improvement rate. European countries show quite low energy intensities.
- High energy intensity countries with good GDP growth need to make efforts to reduce their energy supply / consumption regardless of their energy intensity progress. In particular, Iran, Russia, Nigeria and Pakistan increased their energy intensities despite GDP growth.
- Sub-Saharan Africa (SSA) as a region also made progress but energy intensity remains high. Selected SSA countries (Ethiopia, Kenya, South Africa) all show strong progress, but their energy intensities are very high, along with Nigeria.

# Tracking NDCs

## AMBITION



## ACTION



● Compatible   
 ● Almost sufficient   
 ● Insufficient   
 ● Highly insufficient   
 ● Critically insufficient

**Note:** Based on assessment of NDCs of 38 countries done by Climate Action Tracker (2024). Action represents policy and actions undertaken against domestic modelled pathways. Ambition represents NDC against fair share. Categorization of Compatible, Almost Sufficient, Insufficient, Highly Insufficient and Critically Insufficient follows CAT analysis.

- Tracking NDCs indicate that in the majority of countries, **current levels of ambition are not Paris aligned (Above 2°C)**
- Countries with higher per capita emissions **have shown lower action**
- This indicates there is an ambition gap and greater contributions from emission-intensive countries are needed.

THERE IS A CLEAR NEED FOR A  
**JUST AND INCLUSIVE ENERGY  
 TRANSITION**

CALL TO ACTION

# The energy transition is an opportunity to undo the inequalities of existing systems

[SUBMIT YOUR ENERGY COMPACT →](#)



- As per an International Energy Agency analysis, an estimated **USD 4.5 trillion annually** in clean energy investment is needed by the 2030s to meet the Net-Zero goal. The energy transition presents an unprecedented opportunity to balance the inequalities of existing energy systems, and it is critical that the new investments flow equitably to all countries.
- **31 member states have full Energy Compacts with over USD 830 billion in financial commitments towards SDG7.** Countries also join as signatories to multi-stakeholder compacts
- Energy Compacts have been identified as a **High-Impact Initiative by UN SG.**
- Open platform to make voluntary commitments most relevant to the national context.