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SUSTAINABLE DEVELOPMENT GOALS AT A CROSSROADS

What's next?

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ABOUT THE FELLOWSHIP PROGRAM

Global Neighbours views today's global challenges as shared issues that demand strong international cooperation and a Europe confident in contributing its diverse perspectives to a multipolar world. The organization sees cultural, political, and economic diversity as a strength and promotes dialogue, exchange, and scientific and economic collaboration as drivers of global progress. Its Visiting Fellows Program brings experts from business, politics, society, culture, and the arts to Vienna. During their stay, Visiting Fellows conduct research, build networks, and write a paper on a topic in which they hold expertise, alongside public engagements.



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During his fellowship at Global Neighbours, Prof. Dr. Lukšić examined the future of the Sustainable Development Goals in the context of a weakened multilateral system, as well as current questions of European integration and the position of the Western Balkan countries within this process.

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Abstract

A decade after the adoption of the Sustainable Development Goals (SDGs), the 2025 SDG Report warns that the world is entering a “global development emergency.” This paper examines the trajectory of global development from the Millennium Development Goals (MDGs) to the present, arguing that the apparent successes of the MDG era - driven disproportionately by China’s domestic transformation - created expectations that the SDGs were never structurally equipped to meet. The analysis traces the evolution of the SDG narrative from early optimism to the sobering recognition of systemic fragility, shaped by the pandemic, geopolitical fragmentation, technological acceleration, and a disruptive global energy transition.

It assesses global progress and regression across health, education, digital access, climate, poverty, and debt, and explores regional dynamics in China, Southeast Asia, and India. The publication highlights the chronic failures of development financing, the widening gap between global commitments and delivery, and the growing centrality of private capital in shaping development outcomes. It includes three short country reports: Indonesia, one of the most populous countries in the world; Uzbekistan, a Central Asian country relying on global development platforms; and Serbia, an EU candidate country where alignment with the 2030 Agenda is often assumed to be more straightforward. Together, the three cases point to uneven outcomes, while also underscoring the continued relevance of the agenda’s existence. The analysis concludes by outlining four plausible scenarios for the post-2030 global development agenda and argues that the future of global development will depend less on technical solutions than on political imagination and collective will.

Introduction

Tracing my¹ memories back to Rio 20+ Summit in 2012, and the UN General Assembly in 2015, when UN 2030 Agenda was adopted, I recall mixed feelings about the discussion on the post-Millennium Development Goals framework, which had been adopted in 2000 through a more creative and improvised process. Having been trained largely within the Austrian school of economic thought, I initially perceived the sustainable development agenda as fundamentally interventionist - placing governments, rather than markets, at the center of redistribution and resource allocation. Heading the Montenegrin delegation as Prime Minister back then, we nonetheless supported the global consensus. It was only later that I came to fully appreciate such effort, although from another perspective that does not entirely follow the mainstream line.

The society we shape through human interaction evolves through countless decisions taken in pursuit of our individual plans. Together, these decisions generate outcomes that disperse new knowledge, setting us on the course of reviewing past decisions and taking new ones. As innovation disrupts any tendency toward equilibrium, it also points to the inevitable failure of excessive regulation producing unintended consequences which also applies to the global development agenda. Yet the more we discuss, learn and exchange knowledge and innovation, the more our concerns expand beyond individual well-being or that of our immediate communities to include the natural environment itself. We inevitably realize that these systems are interconnected and that, in the long run, we must adhere to the principles of sustainable development. In the same vein, it is important to eliminate as many barriers as possible to the dissemination of knowledge.

Human civilization prospers to the extent that it can tolerate and absorb diversity, free trade, and innovation. The irony is that some ancient civilizations appear to have grasped this long ago. Yet, studying the trajectory of the SDGs over the past 10 years raises questions about whether modern humankind truly internalized this understanding. Another important aspect is that SDGs are ideally conceived as a grand task to be dealt with by every country. In practice, however, national characteristics vary significantly, and countries thus engage with the UN 2030 Agenda in different ways.

¹ I would like to thank the Global Neighbours research team for their huge support and major contribution in the preparation of this essay, namely: Katherina Mayr, Viktoria Malakhova and Wiebke Aepkers.

For countries aspiring to join the European Union, alignment is often supported by the fact that many SDG objectives overlap with the benchmarks of European integration. This can create a strategic dilemma: whether the SDGs should serve as an overarching national development strategy or whether fulfilling the EU acquis and accession requirements alone is enough. By contrast, in many developing countries, the UN 2030 Agenda should serve as the central pillar of development policy. The short case studies of Indonesia, one of the world's largest countries and a key actor in South East Asia, Uzbekistan, a Central Asian state relying on international experience to support domestic efforts and Serbia, an EU candidate country which supposedly should make attaining UN 2030 Agenda easier, serve to examine this orientation.

From the MDGs to the SDGs

When world leaders gathered at the United Nations in September 2015 to adopt the Sustainable Development Goals (SDGs), they were building on the legacy of the Millennium Development Goals (MDGs) - a 15-year experiment that had delivered some of the most significant improvements in human wellbeing in modern history. The MDGs helped cut extreme poverty by more than half, drove major reductions in child and maternal mortality, expanded access to primary education, and accelerated the fight against HIV/AIDS, malaria, and tuberculosis (UN, 2015). They were not perfect, but they were transformative, at least in the way we thought about development, reshaping the broader landscape in ways that continue to reverberate today.



Figure 1: The Eight Millennium Development Goals (MDGs); AI generated

However, the devil is always in the details, as the same statistics can be interpreted in different ways. The global success of the MDGs was profoundly uneven. A substantial share of the headline achievements - especially in poverty reduction - came from China's extraordinary domestic transformation.

Between 1990 and 2015, China lifted hundreds of millions of people out of extreme poverty, reshaping global statistics so significantly that it became impossible to speak of "global progress" without acknowledging China's gravitational pull (UN, 2015). However, this does not diminish the achievements of other regions; it simply reveals a structural truth that continues to shape the SDGs: global development metrics are driven above all by the trajectories of large-population countries such as India, Indonesia, Nigeria, Pakistan or Bangladesh. Success or failure in those countries will play a similar role in determining whether the UN 2030 agenda succeeds or fails.

The MDGs also mobilized unprecedented levels of aid, philanthropy, and civil society engagement. Major contributors included the United Kingdom, the Nordic countries, Japan, and the United States - like the case of President's Emergency Plan for AIDS Relief (PEPFAR) aimed to address the problem of HIV/AIDS - as well as emerging philanthropic actors such as the Bill & Melinda Gates Foundation. The MDGs demonstrated that clear, measurable goals could galvanize political will and deliver results at scale. But they were narrow. They focused primarily on poor and developing countries and largely ignored structural or cross-cutting issues such as climate change, inequality, governance, and environmental degradation. They did not address the needs of middle-income countries, or the systemic forces shaping global development.

The Sustainable Development Goals were designed to correct these omissions. Adopted by all UN member states, the 17 goals, later followed by 169 targets and more than 200 indicators, represented a universal, integrated vision for transforming societies and economies while safeguarding the planet (UN, 2015). They were ambitious by design - perhaps too ambitious - but that ambition was likely a fair outcome of a process open to all UN member states. They also assumed a world that would continue to cooperate, integrate, and align around shared priorities.



Figure 2: The 17 Sustainable Development Goals (SDGs)

SDG Scoreboard: Changing Narrative

The SDG Report 2025 delivers a stark message: the world is not on track (UN, 2025). The optimism that surrounded the SDGs in their early years has given way to a more sobering assessment of global progress. Looking back to 2015, the atmosphere was generally very positive, although nobody probably would have claimed that the UN 2030 Agenda would have been met by that year. But the overwhelming understanding was that a comprehensive network would have existed as something to build on further. The 2025 report's language is unusually blunt, describing a "global development emergency" and warning that many of the gains achieved since 2015 are at risk of stalling or reversing. The SDGs were conceived as a roadmap; they now read more like a rescue plan.

The evolution of the SDG narrative over the past decade reflects this shift. The early reports radiated confidence. The MDGs had delivered, and the SDGs seemed within reach. By 2018, however, progress was uneven. Inequality widened, climate indicators worsened, and the 2019 report started to emphasize the problem of not being on track. The pandemic years of 2020 and 2021 marked a turning point. COVID-19 triggered the first rise in global poverty in decades, caused massive learning losses, and severely disrupted health systems. The tone of the reports turned urgent, even bleak.

By 2022, the SDG narrative had become structural. The problem was no longer slow progress; it was the architecture of global development itself - financing, governance, resilience. The 2023 and 2024 reports were shaped by what scholars now call the "polycrisis": climate shocks, inflation, debt distress, and geopolitical fragmentation interacting in destabilizing ways. The 2025 report marks a rhetorical break. It no longer speaks of "accelerating progress", it speaks of rescue.

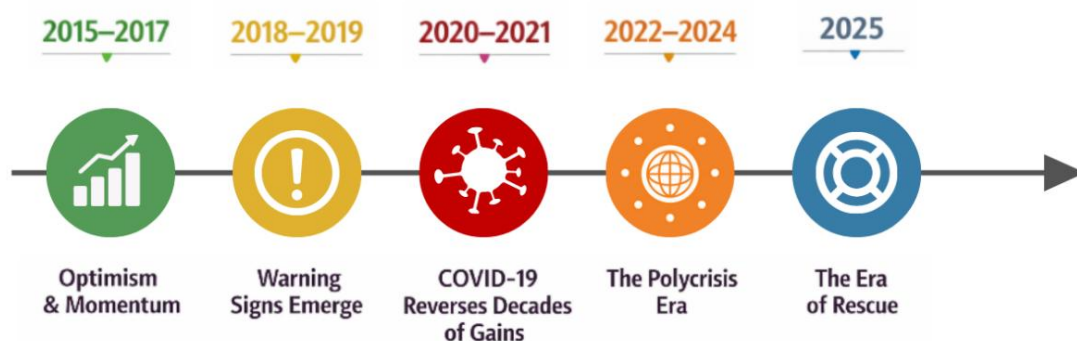


Figure 3: The Narrative Trajectory: From Hope to Hard Reality (Bertramo et al., 2025)

Despite these headwinds, the SDG Report 2025 highlights some extraordinary achievements. Global health has seen remarkable progress: HIV infections have fallen, malaria cases have been averted, and dozens of countries have eliminated neglected tropical diseases (UNAIDS, 2024). Digital access has expanded dramatically, with internet usage rising from 40 to 68 percent since 2015 (ITU, 2024). Renewable energy is poised to surpass coal as the world's largest source of electricity (IEA, 2024). Education enrollment has grown, even if learning outcomes remain fragile (UNESCO, 2024).

These gains were driven by sustained and targeted financing. Long-term support for vaccines, diagnostics, and primary health systems enabled progress in disease control. Expanded digital connectivity reflects large-scale investment in broadband and mobile infrastructure. The acceleration of renewable energy has been propelled by capital flows into solar, wind, and grid modernization, supported by falling costs and policy incentives. Rising school enrollment has similarly been underpinned by investment in education infrastructure, teachers, and social protection mechanisms.

Together, these outcomes demonstrate the lasting impact of coordinated public investment and global partnerships. The legacy of the MDGs is unmistakable: the infrastructure built to combat HIV, tuberculosis, and malaria later became the backbone of pandemic response and routine care in many low-income countries. It is precisely for this reason that measurable progress remains visible in SDGs such as 3, 4, and 7 - good health and well-being, quality education, and affordable and clean energy.

Yet the areas of regression are equally stark. More than 800 million people remain in extreme poverty (World Bank, 2024). Hunger is rising due to conflict, climate shocks, and high food prices (FAO, 2024). Climate indicators are worsening at an alarming pace: 2024 was the hottest year on record (Copernicus Climate Change Service, 2024), and CO₂ levels are the highest in two million years (NOAA, 2026). Debt distress has become a structural barrier to development, with many countries spending more on debt service than on health or education (UN DESA, 2025). In essence, the world is further away from ending hunger today than it was in 2015, and climate change has become the single greatest threat multiplier across all SDGs (IPCC, 2023).

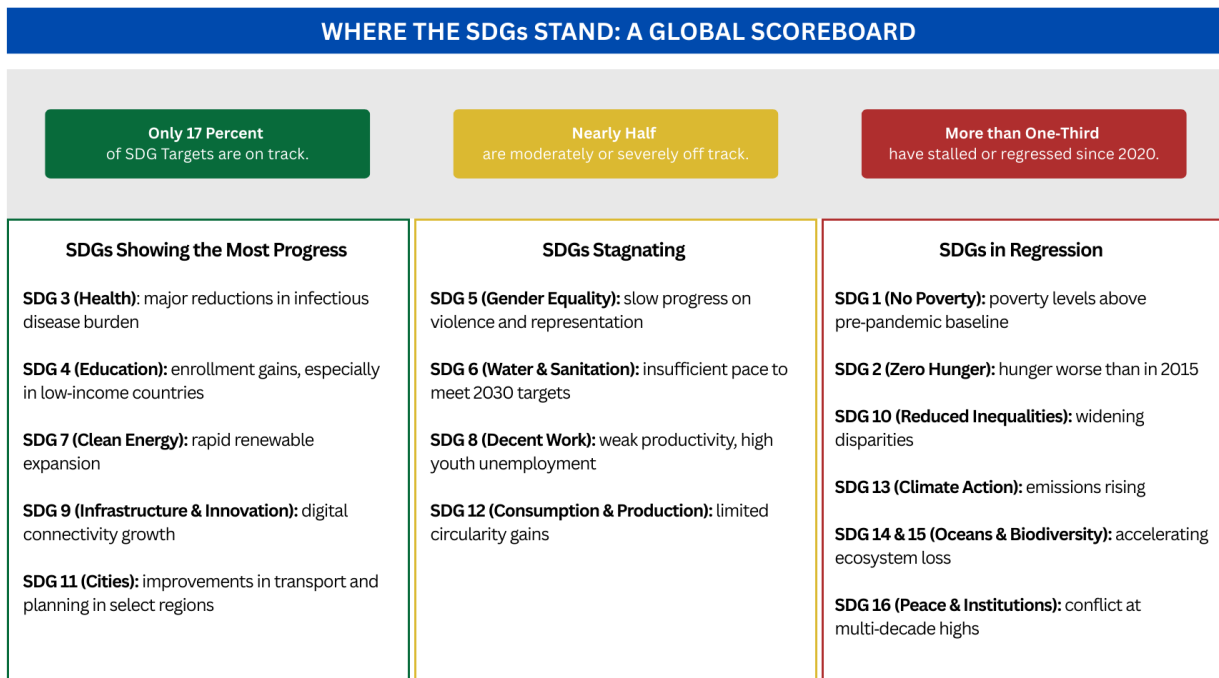


Figure 4: Where the SDGs Stand: A Global Scoreboard

The SDG Index reveals a world of extremes. Nordic countries continue to dominate due to strong welfare systems, low inequality, and ambitious climate policies. Benin, Nepal, and Uzbekistan demonstrate that political commitment and targeted reforms can deliver rapid progress even with limited resources. Conflict-affected states like South Sudan, the Central African Republic, Somalia, Chad, and Yemen remain at the bottom, underscoring that conflict is the single most powerful predictor of SDG stagnation (SDSN, 2025).

China, Southeast Asia, and India - three regions that will shape global development trajectories - present a complex picture of progress and paradox. China leads the world in renewable deployment, digital infrastructure, and poverty reduction (World Bank, 2025), yet it is also the largest emitter of CO₂ (Global Carbon Project, 2024) and faces severe air quality challenges (UNEP, 2021). Southeast Asia is one of the world's fastest growing digital regions (ASEAN, 2024), with a young population and expanding middle class. Yet it is also among the most climate-vulnerable regions (IPCC, 2023), facing rising sea levels, extreme heat, and biodiversity loss (UNEP, 2021; FAO, 2025). India is a giant in transition. Digital inclusion is rising rapidly (Government of India, 2024), renewable energy capacity is expanding (Government of India, 2024) and education access continues to improve (UNESCO, 2024). Yet air pollution remains severe (IQAir, 2024) and malnutrition persists (UNICEF, 2024). Urbanization is accelerating (World Bank, 2024), creating both opportunities and pressures on infrastructure.

Elusive Development Finance

Underlying all of this is a persistent failure: development financing. Over the past decade, governments and institutions have made ambitious commitments to climate finance, adaptation funds, pandemic preparedness, debt relief, and concessional lending. Yet delivery consistently falls short. Many pledges remain unfulfilled or delayed, creating a credibility gap between rhetoric and reality. Public budgets are strained by rising debt service, aging populations, geopolitical spending, and climate disasters, leaving little fiscal space for development. At the same time, productive advancements of the SDGs require trillions in annual investment, far beyond what public finance alone can provide. And this is still the case even though cost assessments are probably inflated due to overlapping goals, overestimating energy demand and underestimating technological advances (The Economist, November 2024). It is worth pointing out that in just two consecutive months, June and July of 2025, NATO member states, which are still among the richest and most developed² decided to increase defense expenditures significantly, putting their public finances³ under additional strain. At the same time, during the follow-up to the Addis Ababa 2015 conference in Seville³, parties³ made new pledges for financing for development despite knowing that public finance is similarly constrained. Rising debt burdens, fiscal consolidation pressures, and competing political priorities limit governments' ability to scale long-term investment and even leads to official development assistance cuts.

Investors face high perceived risk, currency volatility, regulatory uncertainty, weak project pipelines, and limited guarantees. Without stronger regulatory frameworks, reduced political risk, improved project preparation, and more effective blended finance, the SDG financing gap will continue to widen (UN DESA, 2025). Official Development Assistance (ODA) and multilateral finance remain essential but insufficient in scale and are increasingly stretched across humanitarian crises, climate shocks, and geopolitical contingencies (UN, 2025). While private finance is frequently presented as the solution, it has proven reluctant to engage at the scale required without credible risk-sharing mechanisms, guarantees, and longer investment horizons (UNDP, 2024).

² Rising defense spending is not confined to NATO countries. Similar increases have been observed across major and middle powers, reflecting heightened geopolitical tensions, regional conflicts, and growing emphasis on strategic autonomy. This broader shift underscores a global reallocation of public resources toward security priorities, often at the expense of development, climate, and social investment.

³ The United States did not participate in the Seville follow-up conference to the Addis Ababa Action Agenda. This absence is notable given the historically central role of the United States in shaping global development finance, multilateral institutions, and the political momentum behind international development frameworks, including the 2030 Agenda.

A central constraint lies in how risk is priced and perceived. Many countries with significant SDG investment needs face elevated borrowing costs driven by sovereign credit ratings, currency volatility, and debt sustainability concerns - often reflecting market conventions rather than underlying development fundamentals. As a result, capital is abundant globally but poorly allocated, flowing toward lower-risk, short-duration assets rather than toward SDG-relevant sectors that require patient capital and policy stability (UNDP, 2024).

This misalignment is reinforced by the structure of global financial markets themselves. High-level assessments on climate finance emphasize that capital markets remain overwhelmingly oriented toward short-term returns, liquidity, and risk avoidance, despite the long-term nature of climate and development investments. Even where financial resources are abundant, incentives favor rapid turnover and low-risk assets rather than patient capital for infrastructure, energy systems, and resilience. Without reforms to risk-sharing mechanisms, public guarantees, and investment time horizons, climate and development objectives remain structurally disadvantaged within prevailing financial architectures, limiting the scale and durability of SDG-aligned investment (Independent High-Level Expert Group, 2023).

Crucially, this financing gap does not stem from analytical uncertainty. The economic and social returns of investment in human capital, basic infrastructure, and climate resilience are well documented. Instead, the gap reflects a failure to align financial architectures with long-term development objectives. In this sense, elusive development finance is less a technical problem than a political-economic one: without reforms that extend investment horizons and recalibrate risk, the SDGs remain well-defined aspirations rather than consistently bankable pathways.

This disconnect is particularly pronounced at the urban and subnational level, where a large share of SDG implementation must ultimately occur. Evidence shows that cities in low- and middle-income countries are central to economic activity, service delivery, and climate mitigation, yet remain structurally underfinanced. Despite accounting for a significant share of GDP and emissions, most cities lack direct access to long-term finance due to weak creditworthiness, borrowing restrictions, limited project-preparation capacity, and dependence on national guarantees. As a result, SDG-relevant urban investments frequently fail to reach financial close even where development needs and economic returns are clear, reinforcing the gap between global ambition and delivery on the ground.

Recent analyses of climate-smart urban investment reinforce this diagnosis, showing that the primary constraint is not investor-appetite but the absence of project pipelines at the city level. Despite strong economic and social returns, urban projects in low- and middle-income countries struggle to attract private capital due to weak project preparation, limited creditworthiness, and fragmented institutional responsibilities (Global Center on Adaptation & Climate Policy Initiative, 2023).

Without intermediaries, guarantees, and blended finance structures that translate local investment needs into scalable financial products, private capital remains structurally misaligned with urban SDG delivery (UNDP, 2023).

The persistent shortfall in financing for the SDGs reflects not a lack of identified needs or viable investment opportunities, but structural features of the global financial system that systematically disadvantage long-term development objectives (UNDP, 2023). Achieving the SDGs requires sustained capital flows into health, education, infrastructure, energy systems, and resilience. Yet global finance remains overwhelmingly oriented toward short-term returns, liquidity, and risk minimization, creating a fundamental mismatch between the time horizons of development and those of capital markets.

A Decade of Disruption

The SDGs were born in a world that no longer exists. It may, in fact, have ceased to exist even before 2015. The aftermath of the 2008-2009 world economic and financial crises left many people disillusioned and full of wrath, which gave rise to the surge of political populism. One may even argue that political new nativist conservatism has risen against the mirror of the apparently functioning international order, eating away the legitimacy of all the traditional institutions, including the UN system.

The global landscape of 2025 is defined by three forces that have reshaped the terrain beneath the goals: geopolitical fragmentation, technological acceleration, and a disruptive energy transition that brings both opportunities and risks. These forces have not only caused the paradigm shift; they have altered the very conditions under which global development is pursued.

The liberal post-Cold War assumption of a cooperative global economy has evaporated. Recent U.S. administrations have taken sharply different approaches to multilateralism, including decisions to withdraw from or reconsider participation in certain UN treaties and international agreements. These shifts have created uncertainty within the multilateral system and forced other countries to adjust their diplomatic and economic strategies. Tariff realignments on steel, aluminum, semiconductors, and green technologies have reshaped global supply chains and accelerated nearshoring, friendshoring, and the formation of regional trade blocs like the recently, at long last, between the European Union and the Mercosur bloc, comprised of Argentina, Brazil, Paraguay, and Uruguay.

Even the Arctic has become a theater of strategic competition, and at the time of this paper's writing the geopolitical rift over Greenland underscores that what was unimaginable only a decade ago now seems to have become the routine. The search for minerals and rare earths becomes a tangible example of the new political climate, and the new Board of Peace initiative potentially challenges the UN system itself. The SDGs were built on the premise of global cooperation; the world of 2025 is far more fragmented.

This fragmentation is not merely geopolitical, but institutional and fiscal. Multilateral coordination has weakened at the very moment when collective action is most needed - as states prioritize national security, industrial policy, and domestic resilience over shared global commitments. Trade is increasingly securitized, development finance politicized, and climate cooperation filtered through strategic competition rather than common purpose. In such an environment, assumptions underpinning the SDGs - voluntary alignment, peer pressure, and converging incentives - are increasingly strained. What was conceived as a cooperative framework for managing interdependence now operates in a system defined by selective engagement, competing priorities, and fragmented governance, limiting the capacity of the SDGs to mobilize action at scale (Sachs et al., 2025; European Commission & SDSN, 2025; UN, 2024).

At the same time, the 2020s have been defined by a technological surge that is transforming economies, labor markets, and geopolitics. Artificial Intelligence (AI) has moved from experimental to foundational, starting to underpin logistics, healthcare diagnostics, financial systems, public administration, and military planning. The rapid adoption of generative AI has raised new concerns about data governance, algorithmic bias, labor displacement, intellectual property, and global regulatory standards. We may still have some time before the full impact of the changes is felt, but just like with AI, humanoid robots - once confined to research labs - are likely to move rapidly into manufacturing, eldercare, logistics, and service industries. Advances in dexterity, perception, and autonomy have made them viable in environments previously accessible only to humans. Not to mention the space economy which has already almost doubled in size over the past decade, reaching almost \$600bn and becoming a new arena of competition and cooperation, with lunar missions by multiple nations, private companies launching mega constellations, renewed interest in Mars exploration, and intensifying competition over satellite internet markets (Space Foundation, 2024).

Control over rare earth elements and semiconductor manufacturing has become one of the defining strategic issues of the decade. Rare earths are essential for electric vehicles, wind turbines, smartphones, and defense systems, while the semiconductor supply chain remains highly concentrated, with key nodes in East Asia. Export controls, investment restrictions, and industrial subsidies have become tools of strategic competition.

The struggle for technological dominance is reshaping global trade patterns and could become a source of future conflict. It will not be the first time that major conflicts centered on the search for resources. Working out a global development agenda is exactly the way to prevent us from heading back to - as we thought - times long gone by.

The energy transition adds another layer of disruption. Renewables now account for the majority of new power capacity added worldwide. Solar and wind have become the cheapest sources of electricity in most regions, and battery storage costs have fallen dramatically. China has become the gravitational center of the global energy transition, leading in some important aspects, although not all, related to SDG 7. It manufactures over 80 percent of the world's solar panels, produces the majority of global lithium-ion batteries, accounts for most of the world's electric vehicles, and supplies a dominant share of wind turbine components (IEA, 2024). China's domestic deployment is equally significant: it adds more renewable capacity annually than the rest of the world combined, and one can argue it is more a consequence of how China perceives the issue of national security rather than a focus placed exclusively on the UN Agenda 2030. But the transition has also created new tensions. Oil-producing states face uncertain futures. Countries rich in critical minerals - including the Democratic Republic of Congo, Chile, and Indonesia - have gained new leverage. Competition for supply chains has intensified, especially between the United States, China, and the European Union. The energy transition is no longer just about climate; it is about industrial strategy, national security, and global influence.

Selected Short Country Reports

Indonesia

Indonesia's experience with the SDGs illustrates the opportunities and challenges of SDG implementation in a large, diverse upper-middle-income country undergoing structural transformation. Since their formal adoption through the Presidential Regulation No. 59/2017 (and updated by Regulation No. 111/2022), the country has embedded the SDGs into its national and subnational planning architecture, linking them to the National Medium-Term Development Plans (RPJMN) and the 2045 Vision (Republic of Indonesia, 2022; Bappenas, 2023). This institutionalization has enabled relatively strong performance on selected goals, while exposing persistent asymmetries across the SDG framework.

Progress has been most visible in social and human development goals closely aligned with long-standing state priorities. Indonesia has made measurable gains in SDG 1, 3 and 4 (SDSN, 2025). Unlike the global trajectory, poverty declined steadily in the decade prior to the pandemic and, following a temporary reversal in 2020-2021, resumed its downward trajectory, supported by expanded social assistance programs and targeted subsidies. Health outcomes improved through expanded health insurance coverage under the Jaminan Kesehatan Nasional (JKN) scheme, progress in maternal and child health, and post-pandemic investments in primary healthcare systems (WHO, 2022; UN, 2024). Education access remains near-universal at the primary level, with continued expansion of secondary education, although quality and learning outcomes remain uneven across regions (OECD, 2023).

Institutionally, Indonesia stands out among emerging economies because of its formal SDG governance framework. Its Ministry of National Development Planning, Bappenas, coordinates national SDG implementation, supported by Statistics Indonesia (BPS), which produces an SDG indicator dashboard, and by SDG Action Plans which coordinate development at provincial and district levels (BPS, 2024). Regular Voluntary National Reviews (VNRs) emphasize multi-stakeholder engagement, including civil society, academia, and the private sector, reflecting a governance model that treats the SDGs as a coordination framework rather than a standalone development strategy. Indonesia's institutionalization of the framework has strengthened monitoring capacity and policy coherence.

At the same time, performance across the full SDG agenda remains highly uneven. Environmental and climate-related goals - especially SDG 12, 13, 14, and 15 - lag significantly behind (SDSN, 2025). Indonesia's economic model remains heavily reliant on natural resource extraction and coal-based energy, creating structural tensions between growth, employment, and environmental sustainability (IESR, 2024). While national strategies emphasize renewable energy expansion, forest protection, and marine conservation, progress towards these ambitions has been too slow to significantly improve emission trajectories or biodiversity loss at scale (UNEP, 2023).

Subnational disparities further complicate SDG implementation. As a state with substantial regional inequality and the challenges that come with being an archipelagic nation, Indonesia displays wide variation in poverty, health, education, infrastructure, and climate vulnerability across provinces (World Bank, 2023). Despite the formal provincial and district-level Action Plans, implementation capacity at the local level remains uneven, constrained by fiscal dependence on central transfers and limited coordination across sectors (Khoeriyah et al., 2025). As a result, national-level SDG progress often masks persistent localized deprivation.

Financing constitutes another central constraint. Indonesia faces a significant SDG financing gap, particularly for climate mitigation, infrastructure, and environmental protection (UNDP, 2022; UN 2025). The government has responded by promoting innovative financing instruments, including green sukuk, sustainability bonds, and blended finance mechanisms aligned with SDG objectives. While these instruments have enhanced visibility and attracted international capital, evaluations suggest that private finance remains concentrated in lower-risk sectors and social goals, with limited mobilization for transformational climate and environmental investments (UNDP, 2024).

Overall, Indonesia's SDG experience reflects a selective and capacity-driven implementation pattern. Meaningful progress has been achieved where SDG targets align with existing national priorities and established public systems – most notably in poverty reduction, health, education, and gender equality. By contrast, goals requiring redistribution, environmental transition, or fundamental shifts in the growth model have advanced more slowly and unevenly. Due to its large population, Indonesia is bound to play a crucial role in shaping the trajectory and outcome of the UN 2030 Agenda.

Uzbekistan

Uzbekistan illustrates how the Sustainable Development Goals can support development when they are embedded into national strategies and adapted to domestic priorities. Since 2016, the country has aligned selected SDG objectives with its broader reform and growth agenda, integrating them into national planning frameworks rather than pursuing the SDGs as a comprehensive or simultaneous agenda (UN 2022; 2024; Government of Uzbekistan, 2023). Progress has been most visible in SDGs closely linked to state-deliverable policy domains - notably SDG 1, 3, 4, 5, and 16 - a pattern also reflected in comparative SDG assessments, which place Uzbekistan above the regional average on social and governance-related goals while identifying persistent gaps in environmental performance (SDSN, 2025).

Uzbekistan has achieved sustained reductions in poverty, supported by economic growth and the introduction of a national Multidimensional Poverty Index, which improved the targeting and coordination of social policy (UN, 2022; Government of Uzbekistan, 2022). Health and education outcomes have also strengthened, with expanded access to primary healthcare, maternal and child health services, and near-universal coverage in basic education, alongside reforms aimed at improving quality and inclusion (UN, 2024; UNDP, 2024). These advances reflect a deliberate emphasis on human capital development as a foundation for long-term growth. Institutional reforms have further reinforced SDG-aligned progress. Governance initiatives focused on service delivery, administrative efficiency, and data systems have strengthened implementation capacity and enabled more systematic monitoring of development outcomes (UN, 2022; 2024).

The emphasis on governance as an enabling condition for SDG-implementation is institutionalized in the 2026–2030 Cooperation Framework, which places effective, transparent, and data-driven public administration. Rather than treating governance as a standalone objective, reforms in digitalization, accountability, and evidence-based policymaking are explicitly framed as prerequisites for progress across social protection, health, education, and climate outcomes (UN, 2025). Progress on gender-related indicators (SDG 5), including increased political representation and strengthened legal frameworks for gender equality, illustrates how enabling goals can support advances across other SDG areas (UN, 2024).

At the same time, progress has been uneven across the SDG framework. Environmental and climate-related goals - especially SDG 6, 7, 12, and 13 - have advanced more slowly, constrained by structural factors such as water stress, energy intensity, fiscal limitations, and the prioritization of economic stabilization, employment, and social cohesion (Government of Uzbekistan, 2023; SDSN, 2025). The dedicated outcome for the Aral Sea region further illustrates Uzbekistan's differentiated approach to SDG implementation, combining poverty reduction, health, water security, and climate resilience in a geographically targeted strategy rather than uniform national application (UN, 2025). This reflects an explicit sequencing of priorities rather than a rejection of sustainability objectives, an approach directly acknowledged in national SDG reporting which emphasizes phased implementation aligned with fiscal capacity and development priorities (UN, 2024). The prioritization of poverty reduction, health, education, and employment is explicitly justified in national planning by demographic pressures, with the Cooperation Framework highlighting the need to convert rapid population growth into a demographic dividend through sustained investment in human capital and social protection (UN, 2025).

Overall, Uzbekistan's experience suggests that SDG progress can be achieved through selective alignment, prioritization, and sequencing within a national reform strategy. Development gains have been strongest where SDG objectives - particularly SDG 1, 3, 4, 5, and 16 - were integrated into national planning and supported by institutional reform, illustrating how countries can advance selected SDGs while pursuing growth under real fiscal and structural constraints (UN, 2022; 2024)

Serbia

Serbia's performance across the seventeen Sustainable Development Goals displays a distinctly asymmetric pattern, with strong outcomes in selected social goals and weaker performance in structurally demanding areas (SDSN, 2024). This uneven distribution is consistently highlighted in international monitoring frameworks and national reporting on SDG implementation (SDSN, 2025).

The strongest results are observed in SDG 1, 3, 4, 5, and 8, as well as selected quantitative indicators under SDG 16. Extreme poverty remains close to 2 percent of the population, despite a period marked by significant external shocks, including the COVID-19 pandemic and heightened macroeconomic volatility (World Bank, 2023). Serbia maintains near-universal health insurance coverage (WHO, 2022). Enrolment in primary and secondary education exceeds 97 percent (Eurostat, 2024). Women's parliamentary representation surpasses 40 percent (Inter-Parliamentary Union, 2024). These outcomes largely reflect institutional continuity rather than deep structural reform.

The weakest performance appears in goals that require redistribution, environmental transition, or institutional change - most notably SDG 10, 13, 15, and 16. Persistent regional disparities between Belgrade and less developed regions are documented across income, employment, and service access (World Bank, 2023). Serbia's energy system remains heavily coal-dependent, with limited progress in emissions reduction and air quality (IEA, 2024). Weak ecosystem protection and slow expansion of protected areas are also highlighted. Governance indicators show limited improvement in trust, accountability, and institutional effectiveness.

SDGs related to infrastructure, urban development, innovation, and consumption (SDG 9, 11, and 12) occupy an intermediate position. Progress in these areas is largely project-based and donor-driven, relying on externally financed infrastructure and urban development programs (UNDP Serbia, 2023; European Investment Bank, 2024). Evaluations note limited coherence and insufficient scale to generate systemic transformation (European Commission, 2024; OECD, 2023). The uneven pattern of Serbia's SDG performance reflects structural factors rather than inconsistent policy choices. Progress has been strongest in areas where functioning administrative systems were already in place, allowing improvements in access and coverage without institutional reconstruction (UNDP, 2024). These areas also rely on standardized quantitative indicators, which makes them easier to monitor and report.

The EU accession process constitutes another key explanatory factor. Many SDG targets overlap with the *acquis Communautaire*, particularly in social policy, education, and labour regulation (European Commission, 2024). Where such overlap exists, progress is driven primarily by EU conditionality, regulatory harmonization, and access to pre-accession funding, rather than by the UN SDG framework itself (European Commission, 2024).

By contrast, goals that require structural conflict show limited progress. Reducing inequality, advancing climate transition, protecting ecosystems, and strengthening institutions imply redistribution of income, power, and economic rents, as well as challenges to entrenched political and economic interests (UNDP, 2024). In these areas, implementation is frequently delayed or limited to formal compliance.

Finally, this pattern reflects a broader Western Balkan development model that prioritizes macroeconomic stability, foreign direct investment, and large infrastructure projects over redistribution, environmental transition, and institutional reform (EBRD, 2024). Within such a model, SDGs aimed at preserving existing structures advance more easily than those requiring systemic transformation. Overall, Serbia has achieved meaningful progress in roughly four to five SDGs, primarily those linked to coverage-based indicators and established public systems, while progress in six to seven others remains partial and uneven, and the rest show minimal or merely symbolic improvement (SDSN, 2025).

Against this backdrop, national strategic SDG mapping exercises provide important insight into Serbia's potential post-2030 trajectory. Recent studies show that approximately 82.7 percent of SDG targets are embedded in national strategies, indicating a high degree of institutional integration across policy areas such as social protection, infrastructure, climate policy, and regional development (Public Policy Secretariat of the Republic of Serbia, 2024). This finding suggests continuity rather than replacement: the SDGs increasingly function as a reference framework within domestic planning, rather than as a stand-alone, time-bound agenda.

Case Summary

Taken together, the cases of Indonesia, Uzbekistan, and Serbia point to a shared pattern of selective and asymmetric SDG implementation. Across all three countries, the most consistent progress has occurred in social and human development goals, particularly poverty reduction, health, and education - where implementation builds on existing public systems, established policy instruments, and measurable indicators. By contrast, SDGs that require redistribution, environmental transition, or deep institutional reform have advanced slowly and unevenly - reflecting structural constraints rather than a lack of formal commitment.

Despite differences in governance models and external political and institutional environments, outcomes converge in significant ways. Indonesia's institutionalized SDG coordination, Uzbekistan's state-led sequencing, and Serbia's EU-driven alignment represent distinct approaches, yet none has fully overcome structural constraints shaping climate action, inequality, and institutional reform. Ultimately, the SDGs function less as a universal transformation blueprint and more as a flexible reference framework, with progress determined by political willingness, state capacity, and strategic prioritization.

The Post 2030 Horizon

The SDGs formally expire in 2030, confronting the international community with a fundamental question: what comes next? The short country briefs suggest that, despite their complexity, resource constraints, and at times internally conflicting objectives, compass agendas remain valuable strategic reference points for development. The trajectory beyond 2030 will, however, inevitably depend on political will, geopolitical dynamics, and technological disruption, and above all on the global community's willingness to cooperate. This paper does not attempt to exhaustively catalogue all possible future scenarios, nor does it seek to define the contours of a post-2030 global development agenda.

The most pessimistic scenario is one in which the world fails to agree on a successor to the SDGs, leaving development increasingly bilateral, regional, market-driven, and crisis-driven. This scenario reflects a world where geopolitical competition overwhelms global cooperation; multilateral institutions lose influence, and the poorest countries are left most exposed to climate shocks, debt crises, and technological divides. The fragmentation of the international system, the rise of great-power rivalry, and the erosion of trust in multilateral institutions all point in this direction. In this scenario, the SDGs may even formally remain in place but gradually lose practical relevance as geopolitical competition, fiscal pressures, and declining multilateral cooperation undermine collective action. Projections suggest that under current policy pathways, progress toward several core goals will fall short, with outcomes diverging sharply across regions. Rather than a uniform failure, this trajectory produces uneven development gains, reinforcing global asymmetries and leaving many countries behind despite the continued existence of the SDG framework.

Another possible future scenario is a return to the simplicity and clarity of the Millennium Development Goals. The MDGs succeeded because they were focused, measurable, time-bound, and politically compelling. They concentrated on a small set of core priorities: poverty, health, education, gender equality, and basic services - providing a clarity that was able to mobilize donors, governments, and civil society. The MDGs also benefited from strong leadership by major contributors, including the United Kingdom, the Nordic countries, Japan, and the United States, as well as the catalytic role of philanthropic actors such as the Gates Foundation. A post-2030 agenda could revive this model, narrowing the focus to extreme poverty, foundational health, universal education, basic infrastructure, and climate resilience at the community level. Such an approach would potentially appeal to donors seeking measurable, high-impact interventions and to governments wary of sprawling multidimensional frameworks. However, this would also be a major step back. In such a setting, progress persists where political commitment, institutional capacity, and financing align, but global coherence weakens further.

While this approach may preserve momentum in specific regions or sectors, it could reduce the SDGs to a partial or regional agenda rather than a genuine global framework. As noted above, the SDGs were not designed exclusively for low-income countries but as a universal framework, and such a shift would risk weakening their role as a shared reference point for global development.

A third pathway could be to extend the SDGs with updated targets and stronger accountability. This scenario assumes continued belief in universal goals and political willingness to negotiate new targets. It would require improved monitoring and financing mechanisms and a more realistic approach to implementation. The SDGs could be refined to address lessons learned: fewer targets, clearer indicators, stronger financing frameworks, and better integration of climate, digital, and demographic realities. This scenario preserves the SDG-style framework while modernizing its architecture. Such an extension, however, would require a level of political coordination and institutional renewal that may be difficult to sustain in the current international environment. While reforming targets and accountability mechanisms could improve coherence, experience as well as the selected country cases suggest that the effectiveness of global goal frameworks ultimately depends on how they are translated into national policy choices, fiscal commitments, and implementation capacity. Projections indicate that development outcomes are shaped less by the formal existence of global goals than by domestic growth trajectories, institutional strength and policy prioritization, raising questions about whether a revised SDG framework alone could overcome existing delivery gaps. Analyses emphasize that the original SDGs were built on implicit assumptions about cooperation, incentives, and state capacity that no longer reflect today's global environment. It is also argued that without a clearer theory of change linking global ambition to national action, efforts to extend or revise the SDGs risk reproducing familiar patterns in which improved design and reporting coexist with persistent shortfalls in execution. While reform may enhance the framework's legitimacy and analytical clarity, it cannot substitute for the political, financial, and institutional conditions required for sustained implementation. Moreover, assessments suggest that such approaches may underestimate the political and institutional constraints shaping the post-2030 environment, including growing geopolitical fragmentation and uneven state capacity, which continue to limit the prospects for renewed universal ambition (UN, 2024; Clapp et al., 2026).

The final, fourth scenario envisions neither the abandonment nor the formal renewal of the SDGs, but their gradual displacement by a reorganized form of globalization anchored in strategic, rules-based regional blocs. In this scenario, development, climate, and sustainability objectives are pursued less through universal goal setting and more through large trade and investment architectures that embed standards, resilience, and policy coordination into economic integration. This reflects a broader shift toward what has been described as "strategic globalization," in which interdependence is increasingly shaped by power, security, and vulnerability rather than efficiency alone (Farrell & Newman, 2019; 2023).

The evolution of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) illustrates this trajectory. Established amid the fragmentation of the global trade system, the CPTPP has preserved high regulatory standards while expanding membership and deepening commitments. Its continued relevance - despite rising trade barriers elsewhere - demonstrates how selective, but institutionalized openness can persist even as universal multilateralism weakens. Further expansion of CPTPP for instance, to the EU and other countries may position it as the advanced development architecture (Petri & Plummer, 2020; Ghiretti, 2026). In this scenario, SDG-related objectives such as decarbonization, labor standards, and sustainable infrastructure are not abandoned but pursued indirectly through trade rules, investment frameworks, and regulatory alignment embedded in strategic economic partnerships. Development thus becomes anchored less in universal targets and more in enforceable economic arrangements capable of mobilizing capital and shaping incentives. While this approach risks uneven inclusion and weaker universality, it reflects a pragmatic response to a fragmented global system in which large-scale cooperation increasingly occurs through regional and plurilateral institutions rather than global consensus (UN, 2024; Sachs et al., 2025; European Commission & SDSN, 2025).⁴

Taken together, these scenarios suggest that the future of global development cooperation may hinge less on the survival of the SDGs as a framework than on where and how collective action is institutionally anchored. In both cases, it is important to note that the design of any development or transformative agenda is grounded in science-based diplomacy, which, given prevailing narratives in some quarters, is itself increasingly open to debate.

All in all, either a third or the inferior but still positive fourth scenario, they must aim for a new global development framework shaped by the forces that define the twenty-first century. Such a framework would reflect a world where technology, climate, and geopolitics are inseparable from development. It would place climate adaptation and resilience at its core, alongside AI governance and digital rights, planetary boundaries, demographic transitions, global health security, space governance, and the stability of critical minerals and supply chains. This would be a framework for a world in which boundaries between development, security, and technology have blurred. It would require unprecedented levels of cooperation and imagination. While innovative, such an agenda could also build on existing development measurement frameworks. The Human Development Index (HDI), for example, measures progress in life expectancy, literacy and functional literacy, and issues related to the standard of living. Such a framework may in effect be a useful starting point. Classic macroeconomic indicators have long suffered from narrowness.

⁴ This shift is also visible in regionally organized networks such as the Sustainable Development Solutions Network (SDSN), which increasingly operates through regional platforms to address context-specific priorities and implementation challenges.

Goals related to equal access to affordable health care, quality education, jobs, and infrastructure, as well as technological solutions and the protection of air quality, land, and water, could serve as the basis for a new approach. Regional solutions may be better addressed, and the cross-cutting ones would serve merely as a compass.

In this context, any future development agenda should refrain from excessive proliferation of targets and indicators and must be the product of a broad coalition, not only governments, but also cities, corporations, and civil society organizations, reflecting the reality that global development requires multilevel governance to achieve legitimacy. Implementation and monitoring should be based on resource-sharing platforms, enabling successful initiatives to be scaled across contexts.

Conclusion

The SDG Report 2025 is not a eulogy. It is a warning and a reminder of what humanity can achieve when it chooses to act collectively.

After the age of globalization, the global economy may be returning to the age of spheres of influence where trade can be more or less free. Within this setting, trajectories characterized by greater openness would be more favorable. As Johan Norberg reminds us in *Peak Human*, every time a civilization pursued innovativeness, inclusiveness, and free trade prospered; and every time nativist and conservative tendencies - frequently paired with strong influence of dogmatic approaches to religion - prevailed to fortify societies, civilizations failed (Norberg, 2025). These patterns are evident across multiple historical sequences.

Given the current context, these scenarios should be understood as illustrative rather than exhaustive, as future development agendas will likely blend elements of several pathways or take the form of more regional, so-called "coalitions of the willing". While globalization period coincided with MDGs and SDGs, a current more fractured world of questioned multilateralism may search for a horizontally comprehensive but vertically fractured development agenda. This trajectory has already been anticipated in the evolution of contemporary trade agreements which may constitute a possible pathway for the future - given the current global conditions.

In this context, efforts to modernize the SDG framework without fundamentally addressing issues of prioritization, sequencing, and political feasibility may yield improved design, but only limited gains in execution. Recent work on development finance and country platforms suggests that any post-2030 reform of SDGs would need to go beyond target revision and place greater emphasis on delivery mechanisms. Analyses highlight the importance of country-led platforms that align international support with national priorities while systematically integrating subnational and urban actors where a large share of implementation capacity and climate exposure is concentrated. Without stronger multilevel coordination, project preparation capacity, and financing instruments tailored to subnational contexts, even a streamlined SDG framework risks remaining aspirational rather than operational. In this sense, reforming the SDGs would require not only fewer and clearer goals, but also institutional arrangements capable of translating global ambition into investable pipelines and measurable outcomes (World Bank & G20, 2024; UN, 2023).

In many ways, the world of the mid-2020s resembles the world Christopher Clark describes in *Revolutionary Spring* - his sweeping history of the 1848 revolutions. Clark portrays a continent where “multiple crises converged, each amplifying the others,” creating a moment when the old order could no longer hold, and the new had not yet taken shape (Clark, 2023). That sense of simultaneous upheaval and possibility feels uncannily familiar today. Like 1848, our era is marked by technological acceleration, geopolitical fragmentation, economic dislocation, social unrest, and a profound uncertainty about the future.

Clark writes that the revolutions of 1848 were driven by “a sudden opening of the imaginable,” a moment when people realized that the world could be different - and that they had a role in shaping it (Clark, 2023). That insight resonates deeply with the SDG project. The goals were never just a policy framework; they were an attempt to widen the horizon of what humanity believed possible. The question now is whether the world will seize that opening or retreat.

The world already has the tools, technology, and knowledge to move forward. The challenge lies in the temptation to withdraw, to construct barriers, and to close off cooperation. What it needs now is the courage to imagine - and to actively build - the next chapter.

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