



Is EU support for energy in developing countries fully aligned with its climate and sustainable development objectives?

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Front Cover: *Food processing using solar-powered energy in Konseguela, Mali.*

Credit: Geres and Fototala King Massassy

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EU action on climate change and sustainable development

In November 2018, the Intergovernmental Panel on Climate Change (IPCC) highlighted the increased urgency of limiting global warming to below 1.5°C above pre-industrial levelsⁱ. It also showed the disproportionate impacts of any increase in global temperature on the poorest and most vulnerable. Unless action is taken now, 100 million people are at risk of being pushed into poverty by climate change by 2030 and 720 million by 2050.

The EU as a signatory to the 2015 Paris Climate Agreement is a strong supporter of multilateral climate change actionⁱⁱ. In its development cooperation, the EU recognises such action is integral to implementing Agenda 2030 for Sustainable Development. The 2017 European Consensus on Development highlights the importance of a socially inclusive low carbon transition, promising support for ‘the poorest communities in improving access for all to land, food, water and clean, affordable and sustainable energy, while avoiding any damaging effects on the environment’ⁱⁱⁱ.

This aspiration is also reflected in the objectives of EU energy support provided to developing countries. The EU aims to support delivery of Sustainable Development Goal (SDG) 7 on ensuring affordable, reliable, sustainable and modern energy for all by 2030^{iv}. SDG 7 recognises the interlinkages between shifting away from fossil fuels - as the major cause of global warming - to renewable and efficient energy systems globally, and the enabling role access to modern energy can play in development areas such as health, education, inclusive economic development and gender equality^v.

Around one billion people still lack modern electricity and three billion people – more than forty percent of the world’s population – lack access to modern cooking fuels and technologies, with devastating health impacts^{vi}. Indoor air pollution due to inefficient use of solid fuels and kerosene for cooking causes 3.8 million deaths annually, particularly impacting women and children under five^{vii}. Eighty seven percent of those without electricity live in rural areas, far from centralized electricity grids, in what is called the ‘last mile’.

A least-cost assessment indicates that to connect these communities, over two-thirds of electricity investment should flow to distributed, off-grid and mini-grid solutions powered by renewable energy (distributed renewable energy or DRE)^{viii}. A business-as-usual pathway prioritising centralised grid extension will leave an estimated 674 million people without electricity in 2030. Scale up of DRE would also provide a climate ‘win-win’ by enabling low carbon development.

The affordability of energy services and products remains a significant barrier for those living in energy poverty and in last mile contexts energy markets are often non-existent or emergent. Public finance from international development partners such as the EU – particularly concessional and blended finance - along with enabling environment support will play a critical role in building inclusive energy markets for poor and vulnerable groups^{ix}. Non-market-based approaches to delivering energy access, such as social protection approaches, may also be needed to connect the poorest and most vulnerable groups and ensure ‘no-one is left behind’ in the low carbon energy transition^x.

Finance for energy access – the current picture

In 2018, Sustainable Energy for All (SEforALL) estimated the annual cost to reach SDG7 by 2030 at \$52 billion for electricity access and \$4.4 billion for clean cooking access^{xi}. Their analysis of global finance for energy access in 2015-16 showed that investment in electricity access in the twenty 'High Impact Countries (HICs)' – those with the largest populations living in energy poverty^{xii} - was in fact just over half the amount needed (\$30.2bn)^{xiii}. Only around 1% of the total went to the DRE solutions needed by most energy-poor communities.

Clean cooking is too often the 'poor relation' when it comes to energy access financing, despite the gendered impacts of energy poverty and its contribution to a global health crisis. Progress on access to clean and efficient cooking solutions is even slower – and in some countries, it is declining^{xiv}. Only \$30 million in financing for clean cooking, out of the estimated \$4.4 billion required, was recorded in 2014-15^{xv}. From an even lower base, flows also appear to be decreasing^{xvi}.

Is the EU's current support for energy in developing countries on track to deliver its climate and sustainable development objectives?

Given the urgency of addressing both the climate crisis and delivering the SDGs - and the opportunity for 'win-wins' through scale-up of energy access – it is vital to understand how much international energy support the EU is currently providing, where, and for what sources and stages of delivery.

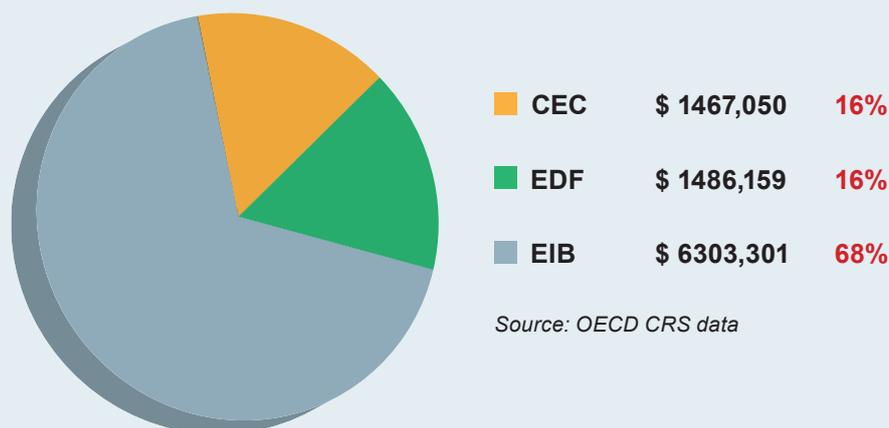
In 2018, CIDSE, the international network of Catholic development organisations, commissioned Overseas Development Institute (ODI) to analyse EU institutional support for energy disbursed between 2010 and 2016, including ODA and other official support via the European Investment Bank (EIB)^{xvii}. The aim was to obtain a clear picture of whether EU energy support in developing countries is aligned with its climate and SDG commitments^{xviii}.

Going forward, this baseline is critical for tracking the direction of travel of EU energy support and whether it is aligned with implementing the Paris Agreement and the SDGs, under the new Neighbourhood, Development and International Cooperation Instrument (NDICI). For this reason, the analysis of EU energy support 2010-16 is an important input to discussions on the EU's new multi-annual financial framework (MFF) for 2021-27.

Analysis of EU support for energy - 2010-2016

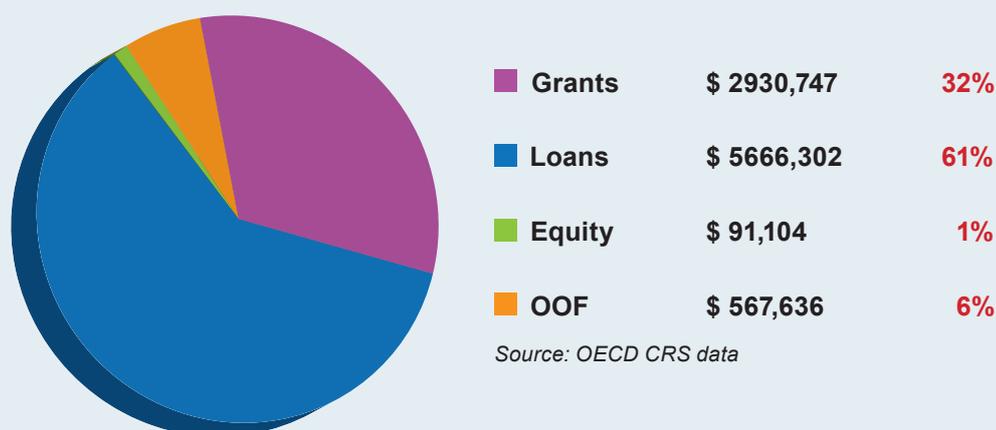
The key findings of the analysis are summarised below. A full report, pie charts and infographics outlining the findings, methodology [and table of data sources] can be found at: www.cidse.org

Figure 1. Total support for energy by EU institutions 2010-2016 (\$ million)



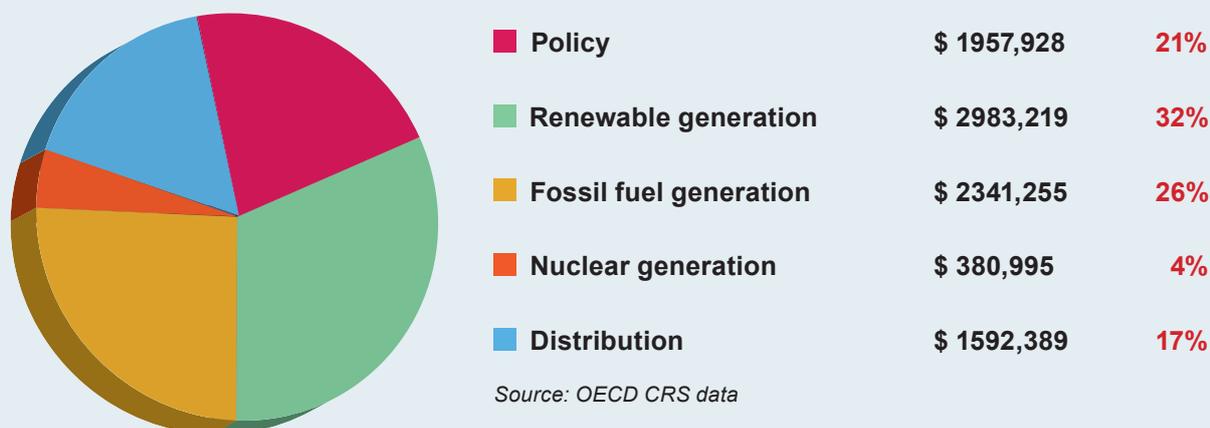
Between 2010 and 2016, the EU institutions provided a total of \$9.256 billion to support energy investments and the development of the energy sector in developing countries, channelled through the Commission (CEC), European Development Fund (EDF) and European Investment Bank (EIB). Over two thirds (68%) of the total support was channelled via the EIB.

Figure 2. EU support for energy by flow type 2010-2016 (\$ million)



There were four types of support for energy: ODA grants, ODA loans, equity investments and other official flows (OOF). The support included \$8.688 billion in ODA. OOF flows through the EIB totalled \$567.637 million while equity investments were negligible. ODA loans were the largest share by flow (\$5.7 billion) while ODA grants accounted for almost a third of the total (32%).

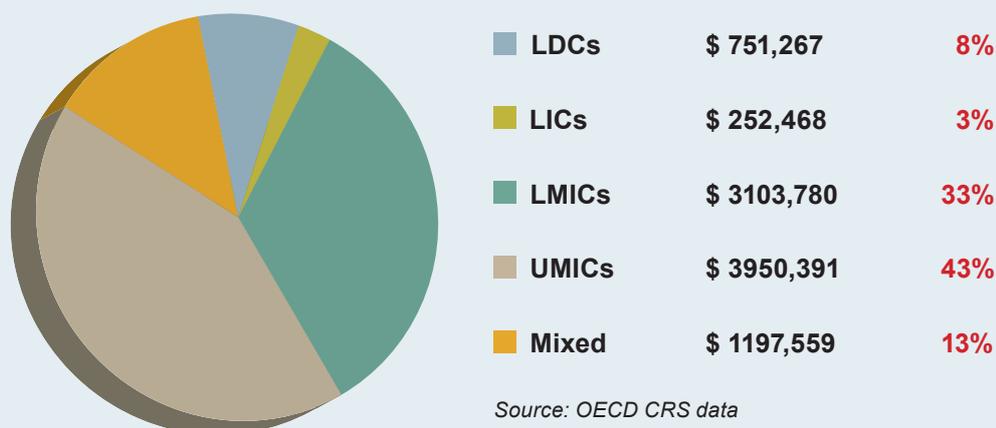
Figure 3. EU support for energy by purpose 2010-2016 (\$ million)



Support for power generation accounted for 62% of the total, with a further 17% for distribution (mostly electricity transmission and distribution). Over half the generation support went to renewable energy (RE) – 32% or just under \$3 billion. For around half of the \$3 billion disbursed for RE generation, it was not possible to identify which energy sources were supported.

26% of EU energy support went to fossil fuels. Most of the support for fossil fuel power generation - 83% or \$2.3 billion - did not identify the energy source. 1% (\$24 million) was identified as being for coal.

Figure 4. EU support for energy by recipients' income-group 2010-2016 (\$ million)



Only 11% of the total amount of just over \$9.256 billion went to low-income and least developed countries (LDCs). Three-quarters (76%) went to middle-income countries, most to upper middle-income countries. It is also worth noting that European countries received more than a third (35%) of the support and that Sub-Saharan Africa and South Asia, the two regions with most of the world's population without access to electricity, received less support than these countries.

Table 1. The 20 highest recipients of support for energy 2010-2016 (\$ million)

Country	\$ million
1. Turkey	2092.472
2. Egypt	841.244
3. Morocco	619.937
4. Ukraine	573.201
5. India	394.819
6. Tunisia	332.124
7. China (People's Republic of)	313.950
8. Brazil	239.357
9. Kenya	234.608
10. South Africa	216.023
11. Jordan	181.461
12. Serbia	171.514
13. Democratic Republic of Congo	147.024
14. Georgia	124.655
15. Chile	120.757
16. Moldova	102.258
17. Bosnia and Herzegovina	88.411
18. Tanzania	87.352
19. Liberia	78.034
20. Honduras	71.720

Table 1 shows the top 20 countries receiving EU support. The list includes four European countries.

Turkey, whose population had universal access to electricity before 2010⁸, was the top recipient of EU energy support (\$2 billion). It received more than double the support given to the second highest recipient, Egypt.

EU support for energy access

Table 2. Support for energy access by channel 2010-2016 (\$ million)

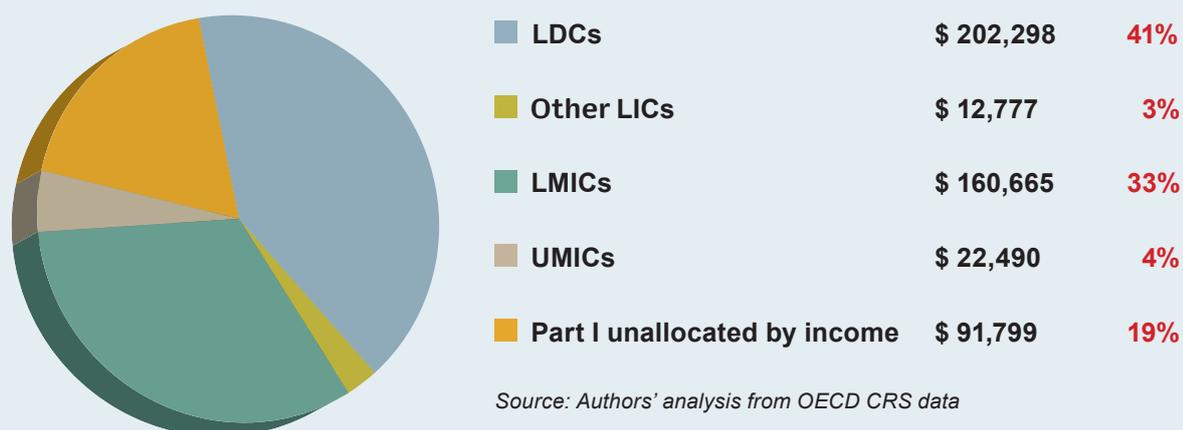
	Total support for energy (\$ million)	Support for energy access (\$ million)	Percentage of total for energy access
CEC	1,467.05	218.97	14.9%
EDF	1,486.16	227.58	15.3%
EIB	6,303.30	43.48	0.69%
All EU Institutions	9,256.51	490.03	5.3%

Source: Authors' analysis from OECD CRS data

Only 5.3% of the total EU energy support was identified as being for energy access (\$490 million). Less than one per cent of this was provided by the EIB, the main channel for EU support.

Just over half the support for energy access from EU institutions went to renewable energy generation (51%) with a negligible amount for fossil fuel generation. A quarter (24%) went to distribution and a quarter to policy support. The focus on generation is concerning given that simply adding generating capacity – powered by whatever energy source – will not ensure populations are connected to reliable, affordable and sustainable modern energy^{xix}. In over half of the RE projects funded (57%), it was not possible to identify the energy source.

Figure 5. Support for energy access by country income-group 2010-2016 (\$ million)



Source: Authors' analysis from OECD CRS data

The poorest countries, Least Developed Countries (LDCs) and Low Income Countries (LICs), received 44% of support. Middle-income countries received 36%, while 19% was disbursed to programmes covering more than one country income group. More than three-quarters of access support went to Africa, 60% to Sub-Saharan Africa. The South and Central Asia region, where half of the world's population without access to electricity and most of those without clean cooking live, received just \$1 million in EU support for energy access.

Table 3. Twenty highest recipients of support for energy access 2010-2016 (\$ million)

Country	\$ million
1. Morocco	28.329
2. Tanzania	26.866
3. Cameroon	23.712
4. Nigeria	20.324
5. Egypt	19.960
6. Moldova	18.981
7. Côte d'Ivoire	15.569
8. Rwanda	14.578
9. Senegal	14.404
10. Mauritania	13.827
11. Burkina Faso	13.309
12. Benin	13.166
13. Democratic Republic of Congo	13.014
14. Uganda	12.527
15. Kenya	11.563
16. Philippines	11.058
17. Nicaragua	9.733
18. Central African Republic	8.986
19. Zambia	7.362
20. Madagascar	7.188

The top twenty countries for energy access received 62% of total support. All but three of these countries were in Africa. However, under half the top recipients were among the twenty 'High Impact Countries' (HICs) with the largest populations living in energy poverty (seven were HICs for cooking access and seven HICs for electricity access).

Conclusions

The EU provides a significant amount of support for energy in developing countries – well over \$9 billion in the period analysed. This means that it has the potential to play a leading role in supporting a socially inclusive energy transition - particularly given the importance of public and grant finance in ensuring no-one is left behind in the 'last mile' and the financing gap for DRE and clean cooking solutions.

It is concerning that although more EU support goes to renewable energy, the EU still provides a significant amount of support for fossil fuels in developing countries – over \$2 billion in the period analysed. While only a negligible amount for coal generation (\$24 million) was identified, the energy source of most of the fossil fuel generation supported was unclear.

Most EU energy support goes to upper middle-income countries: a large share also goes to other European countries. The poorest countries, and countries with the largest population without modern energy (HICs), received only a small amount of EU support. LICs and LDCs receive only eleven percent of energy support and only a minority of HICs receive EU support for energy access.

Overall, EU support for access to modern energy by poor and vulnerable groups represents a tiny proportion – just 5% - of its total energy support. The lack of support is most glaring in the case of the South and Central Asia region, where half of the world's population without access to electricity and most of those without clean cooking live. This region received just \$1 million in EU support for energy access.

In conclusion it is difficult to see how EU support for energy in the period 2010-16 aligns with ambitious action on climate change and an supportive inclusive low carbon energy transition in developing countries. Under the new MFF, given the increasing urgency of integrated action to keep below 1.5°C of global warming and achieve the SDGs, this support will need to be urgently recalibrated.

How easy is it to get a clear picture of EU support for energy?

ODI analysed public data from the OECD's Creditor Reporting System (CRS), which has twenty-three different codes for categorising energy projects. One of the challenges is that the same level of detail is not available for all projects. Another is that donors use the codes inconsistently or resort to using general codes such as 'energy generation renewable sources – multiple technologies'. For more than a third of the EU's support - for policy and energy distribution - the data does not identify the sources of energy supported. The same problem applies to around half of the thirty two percent of support going to renewable power generation.

Finally, there is no CRS code for 'energy access', which makes it difficult to assess the level of support. For this reason, independent criteria were used to assess whether individual projects had an energy access objective^{xx}. While this means the level of support may be underestimated, it is unlikely to affect the overall picture materially.

How could EU energy support be better aligned with its climate and sustainable development objectives?

Given that an overarching objective of the Paris Agreement is ‘making finance flows consistent with a pathway towards low greenhouse gas emissions and climate-resilient development’^{xxi}, the EU has a responsibility to ensure all its international public finance aligns with its climate and SDG commitments and promotes a ‘leaves no-one behind’ approach, including its energy support.

Such alignment would start with phasing out any EU support for fossil fuels in developing countries –with urgent defunding of any support for coal development^{xxii, xxiii}. Many international financial institutions and governments have already restricted or excluded, coal financing, including the World Bank Group (WBG) and the European Investment Bank^{xxiv}. Similar, bilateral initiatives are being taken by countries including China and some EU Member States^{xxv}.

Research has shown that investment in renewable energy and energy efficiency are better options for powering climate resilient development in poorer countries than outdated fossil fuel technologies^{xxvi}. Renewable technologies have become cost competitive with fossil fuels in many countries, despite the high level of ongoing public subsidies for fossil fuels^{xxvii}.

Scaled-up international public finance is also crucial to plug the current energy access financing gap – particularly for DRE and clean cooking solutions. Investment in research, demonstration and scale-up of appropriate financing models and instruments plus increased support for building the enabling environment to deliver last-mile energy access is equally important^{xxviii}. Research and field experience highlight that top-down, ‘one-size-fits-all’ energy service planning and delivery tends not to be effective in delivering last mile access^{xxix}. More inclusive and locally appropriate planning approaches are needed to ensure investments are financially, environmentally and socially sustainable and maximise impact across different SDGs^{xxx}.

Finally, continued reliance on outdated binary metrics for measuring energy access (i.e. ‘having a household electricity connection or not’; ‘cooking with solid fuels or not’) is a barrier to progress. The language of SDG 7 recognises that just measuring household connections, for instance, does not tell us if people have an electricity service that is affordable, reliable and safe to use. Without an accurate understanding of the real levels of energy access in a given context, governments and their development partners such as the EU cannot determine effectively which investments to prioritise.

The EU has supported the development of a more meaningful approach to determining levels of energy access through the WBG’s Global Tracking Framework (GTF)^{xxxi}. The GTF has developed a set of metrics for tracking levels of access progressively and across a range of energy services (at household and community levels and for productive uses). Further support is needed to operationalise such approaches as tools for more effective and inclusive service planning at national level in countries with high levels of energy poverty.

Recommendations

To ensure its energy support in developing countries is aligned with its climate and SDG commitments, the EU should:

1. Make an immediate commitment to phasing out all EU support for fossil fuels, with support for coal defunded immediately, and to scale up RE and energy efficiency (EE). This should apply to all energy support channelled through the new NDICI.
2. Adopt a 'whole portfolio' investment approach to ensure all forms of energy support via all channels, ODA and non-ODA support the shift to low carbon, socially inclusive energy.
3. Ensure robust screening of individual energy investments, with safeguards for identifying and mitigating climate, environmental and human rights risks^{xxxii}.
4. Prioritise energy investments in poor countries most in need of international support to transition to low carbon energy systems.
5. Significantly scale up support for energy access as a proportion of total EU energy support and prioritise investment in 'High Impact Countries (HICs)' and Least Developed Countries (LDCs).
6. Scale up investments in DRE and clean and efficient cooking solutions, as the least-cost options to reach most people living in energy poverty.
7. Ensure equal priority is given to clean cooking and support targeted strategies to address the gendered aspects of energy poverty.
8. Invest more in for research, demonstration and scale-up of innovative 'last mile' energy access financing and business models and enabling environment support, including more inclusive energy service planning and delivery.
9. Develop more consistent and transparent reporting on its energy support through the OECD CRS - and encourage peers to do the same – so that the stages of energy delivery and energy sources supported can be easily tracked.
10. Work with other development actors to operationalise more impact-focussed metrics for energy access investments, using approaches such as the World Bank's Global Tracking Framework (GTF).

Endnotes

- i IPCC, 2018. *Global Warming of 1.5 °C: an IPCC special report on the impacts of global warming of 1.5°C above pre-industrial levels and related global greenhouse gas emission pathways, in the context of strengthening the global response to the threat of climate change, sustainable development, and efforts to eradicate poverty*. <https://www.ipcc.ch/sr15/>.
- ii The European Commission has also recommended to member states an EU GHG net-zero emissions target of 2050.
- iii European Council, 2017. Decision 9459/17, 19 May 2017.
- iv The EU was also a strong supporter of SDG7's precursor, the Sustainable Energy for All (SEforAll) initiative, under which it pledged to provide access to sustainable energy services to 500 million people by 2030. Under the the Africa-EU Energy Partnership (AEEP), the EU has promised to give 100 million Africans energy access by 2020 and build 10,000 MW of new hydropower facilities, 5,000 MW of wind power capacity, and 500 MW of solar energy capacity.
- v Sustainable Energy for All (SEforALL), 2017. *Why Wait? Seizing the Energy Access Dividend*. https://www.seforall.org/sites/default/files/Why_Wait-Full.pdf
- vi IEA, IRENA, UNSD, WBG & WHO, 2018. *Tracking SDG 7: The Energy Progress Report 2018*. <https://www.esmap.org/trackingSDG7-progress-report>.
- vii WHO, 2018. *Household air pollution and health*. <https://www.who.int/news-room/fact-sheets/detail/household-air-pollution-and-health>
- viii Ibid.
- ix For further discussion on the financing issues, see ECDPM, 2017. The EU's financial instruments for access to energy in sub-Saharan Africa. <https://ecdpm.org/publications/eu-financial-instruments-access-energy-sub-saharan-africa/>. Also IIED, 2019(a). *Bridging the gap: how inclusive finance boosts access to off-grid energy*. <http://pubs.iied.org/pdfs/17494IIED.pdf>. IIED, 2019(b) (forthcoming) *Move More Money: Can aggregation catalyse off-grid financing?* CAFOD & IIED, 2019 (forthcoming). *Reaching the last mile: the role of international public finance in delivering energy access*.
- x For further discussion, see CAFOD and ODI, 2018. Pickard & Scott. *Energy safety nets. A literature review*. <https://bit.ly/2D0auva>.
- xi SEForALL, 2018. *Energizing Finance: Understanding the Landscape 2018*. <https://www.seforall.org/energizingfinance>.
- xii "High Impact Countries" are the countries which have the largest population living without access to clean cooking or electricity, and so where progress would have the biggest impact on meeting SDG7. These 20 countries with the highest levels of electricity and cooking poverty together account for nearly 80% of those living without access to sustainable energy. For electricity access, these countries are: Afghanistan, Angola, Bangladesh, Burkina Faso, DR Congo, Ethiopia, India, Kenya, DPR Korea, Madagascar, Malawi, Mozambique, Myanmar, Niger, Nigeria, Philippines, Sudan, Tanzania, Uganda and Yemen. For cooking access, these countries are: Afghanistan, Bangladesh, China, DR Congo, Ethiopia, India, Indonesia, Kenya, DPR Korea, Madagascar, Mozambique, Myanmar, Nepal, Nigeria, Pakistan, Philippines, Sudan, Tanzania, Uganda and Vietnam.
- xiii The analysis looked at energy access finance flows from all sources (public, private, domestic and international).
- xiv International Energy Agency (IEA), 2017. *Energy Access Outlook 2017: From Poverty to Prosperity, World Energy Outlook Special Report, 2017*. <https://bit.ly/2leDDe7>.

- xv Ibid. Just under eighty per cent of the finance for electricity access flowed to three countries in SE Asia, India, Philippines and Bangladesh in the reporting period 2015-16.
- xvi Compared to 2013 and 2014 figures. See SEforALL, 2018. Op. cit.
- xvii ODA was channelled through the European Commission, EDF & EIB.
- xviii This period covers the launch of the Sustainable Energy for All initiative but before implementation of the Paris Agreement and Sustainable Development Goals.
- xix See CAFOD, Christian Aid & ODI et al, 2017. Op. cit.
- xx For more information on the reporting issues, as well as details on the methodology used for identifying energy access support and summaries of source tables, see www.cidse.org.
- xxi UNFCCC, 2015. ADOPTION OF THE PARIS AGREEMENT, FCCC/CP/2015/L.9/Rev.1, 12 December 2015.
- xxii To stay within the limits laid out in the Paris Agreement, climate scientists calculate that emissions from the world's coal fleet must be reduced by at least 30% by 2025. Climate Analytics (2016). *Implications for the Paris Agreement for coal use in the power sector*: http://climateanalytics.org/files/climateanalytics-coalreport_nov2016_1.pdf
- xxiii Climate Action Tracker (2016). *The ten most important short-term steps to limit warming to 1.5c*, <https://climateactiontracker.org/press/the-ten-most-important-short-term-steps-to-limit-warming-to-15c/>
- xxiv World Bank, 2013. *Toward a Sustainable Energy Future for All: Directions for the World Bank Group's Energy Sector & EIB, 2013. Energy Lending Criteria*.
- xxv Germany, France, Netherlands, Finland, Iceland, Norway, and Sweden and the EU.
- xxvi Jacobson, M. et al. (2017). *100% Clean and Renewable Wind, Water, and Sunlight All-Sector Energy Roadmaps for 139 Countries of the World*. Joule 1, 108-121.: <https://web.stanford.edu/group/efmh/jacobson/Articles/I/CountriesWWS.pdf>
- xxvii ODI, 2016. van der Burg, L., Whitley, S. *Rethinking power markets: capacity mechanisms and decarbonisation*. <https://www.odi.org/sites/odi.org.uk/files/resource-documents/10569.pdf>. See also CAFOD, ODI et al, 2015-16. FAQs on coal and poverty <https://www.odi.org/faq-coal-economic-development-and-poverty-reduction>.
- xxviii See for instance Hivos, 2018. *ECDPM – EU's financial instruments (FIs) to leverage private finance in view to promote universal access to energy*. See also IIED, 2019(a) & (b) and CAFOD & IIED, 2019. Op.cit.
- xxix For further discussion, see CAFOD, Christian Aid & ODI, et al, 2017. *FAQs: coal and energy poverty*. <https://www.odi.org/coal-and-poverty-faq-energy-access>.
- xxx With regards to the importance of more inclusive planning approaches, see Garside & Wykes, 2018. *The Energy Delivery Model Toolkit*, CAFOD & IIED.
- xxxi See <https://energydata.info/dataset/gtf-global-tracking-framework-2017>
- xxxii This includes any support channelled via intermediaries. There are specific risks inherent in lending through financial intermediaries (FIs) - in particular, the difficulty in ensuring that environmental and social safeguards are applied to sub-projects and the lack of transparency around FI investments.



Off-grid solar power, Koneguela, Mali. Credit: GERES and Fototala King Massassy

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