



LOWY INSTITUTE
SOUTHEAST ASIA AID MAP

2025 KEY FINDINGS REPORT

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SOUTHEAST ASIA AID MAP 2025 KEY FINDINGS REPORT

About the project

The Southeast Asia Aid Map — launched by the Lowy Institute in 2023 — is a comprehensive database tracking official development finance (ODF) flows in Southeast Asia. By promoting greater transparency of ODF flows, the Lowy Institute seeks to increase coordination, improve accountability, and strengthen decision-making and policy debate on aid, development, and geoeconomic competition in the region.

This third edition of the Southeast Asia Aid Map encompasses the period from 2015 to 2023. It includes data on more than 130,000 projects carried out by 109 development partners, totaling \$290 billion. The research covers all 11 Southeast Asian nations: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand, Timor-Leste, and Vietnam.

The Map synthesises millions of data points from official reporting mechanisms and databases. It combines this with information from thousands of publicly available documents including annual reports, financial statements, budget documents, news media reporting, and social media sources. The resulting database is the most comprehensive account ever assembled of development projects in Southeast Asia.

This 2025 Key Findings Report includes an analysis of Southeast Asia's evolving development finance landscape and a series of profiles on each of the 11 Southeast Asian countries covered in the database.

Key findings in 2025

- Regional development support increased modestly in 2023 but remained below pre-Covid levels.
- US, EU, and UK aid cuts could see official development finance to the region decline by more than \$2 billion in coming years.
- Western aid cuts and rising trade tensions will reduce Southeast Asia's development choices and risk ceding ground to China.
- Aid cuts will also deepen a development divide, with poorer countries and social sector priorities falling behind.
- Southeast Asia's infrastructure race has slowed to a crawl.
- The region's energy transition is dangerously underfunded, with global implications.
- Progress on climate and social inclusion may come under pressure.

To see more and use the fully interactive features of the Southeast Asia Aid Map, visit seamap.lowyinstitute.org

Contents

Overview	2	Country profiles	18
The Southeast Asia Aid Map in four charts	4	Brunei	18
		Cambodia	19
Understanding official development finance	6	Indonesia	21
		Laos	23
Analysis	7	Malaysia	25
Regional development support	7	Myanmar	27
Western aid cuts	8	Philippines	29
Development choices	9	Singapore	31
Development divide	10	Thailand	32
Infrastructure race	13	Timor-Leste	34
Energy transition	14	Vietnam	36
Climate and social inclusion	16	Regional initiatives	38
		Methodology	40
		Notes	42
		About the lead authors	43

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Overview

A wave of impending aid cuts is set to hit the region hard

Southeast Asia finds itself at an uncertain moment in its development trajectory. The region's highly successful export-driven economic model is at risk as the Trump administration looks to dramatically reshape the global trade order, with Southeast Asia potentially facing especially punitive US tariffs. At the same time, official development finance (ODF) to the region — encompassing traditional aid, such as grants and concessional loans (ODA), as well as other official flows (OOF) from foreign governments and multilateral bodies — is set to decrease as major Western donors cut back on foreign aid.

This third edition of the Southeast Asia Aid Map shows **total ODF in 2023 grew modestly** (the latest full year of reporting) to reach \$29 billion — up from \$26.5 billion in the previous year but well below the pre-pandemic average of \$33 billion. This year-on-year uptick in ODF was largely driven by increased non-concessional loans from the region's largest development partners. China ramped up disbursements by almost 50%, with an acceleration in the implementation of key infrastructure projects such as the Jakarta–Bandung High-Speed Rail in Indonesia and the East Coast Rail Link in Malaysia. The World Bank and Asian Development Bank also increased their disbursements, providing substantial budget support to the region's major economies in the wake of the Covid-19 pandemic.

However, aid cuts by major Western donors are expected to see total ODF inflows decline in coming years. In 2024, seven European governments (France,

Germany, the Netherlands, Sweden, Finland, Austria, and Italy) and the European Union announced \$17.2 billion in foreign aid (ODA) cuts to be implemented between 2025 and 2029. Even more drastic has been the Trump administration's decision to halt around \$60 billion in ODA — most of the United States' overseas aid program — beginning in early 2025. The United Kingdom followed suit, announcing reductions in annual ODA of around \$7.6 billion, as it redirected government funding towards defence.

Based on recent announcements, this report projects total ODF to Southeast Asia will fall by more than \$2 billion, back to about \$26.5 billion by 2026. Driving this is **a 20% expected reduction in bilateral aid to the region**, which is projected to decline from about \$11 billion in 2023 to \$9 billion in 2026. Poorer countries and social sector priorities such as health, education, and civil society support that rely on bilateral aid funding are likely to lose out the most.

Aid cuts will deepen a pre-existing development divide. Southeast Asia's higher income countries are already capturing the lion's share of international ODF, while lower income nations such as Timor-Leste, Cambodia, Laos, and Myanmar that rely more heavily on grants and concessional loans are being left behind despite rising poverty in these countries in recent years. If the current trajectory continues, especially amid Western aid cuts, this divide will become more entrenched, undermining the region's long-term stability, equity, and resilience.

Whereas geopolitical competition at least promised higher development financing to countries in the region, the impending reduction in development support risks leaving many important sustainable development priorities even more underfunded. Across the region, ODF plays a key role in funding infrastructure, climate action, humanitarian relief, civil society support, gender equality, and disability inclusion. But despite substantial economic development over decades across most of Southeast Asia, about 13% or some 86 million people in the region still live on less than \$3.65 per day.

The centre of gravity in Southeast Asia's development finance landscape looks set to drift East, notably to Beijing but also Tokyo and Seoul. This comes after several years in which Western donors had shored up their role as development partners to the region, especially as China's ODF contracted from its earlier highs.

Combined with potentially weakening trade ties with the United States, **Southeast Asian countries risk finding themselves with fewer alternatives to support their development**. Even as the infrastructure race slows, China's relative importance as a development actor in the region will rise as Western development support recedes. Beijing retains a substantial pipeline of infrastructure projects and has shown continued appetite to take on major projects. In 2023, there was a fourfold increase in Chinese infrastructure project commitments — from a low of

\$2.5 billion in 2022 to almost \$10 billion the following year — due to the revival of the Kyaukphyu Deep Sea Port project in Myanmar.

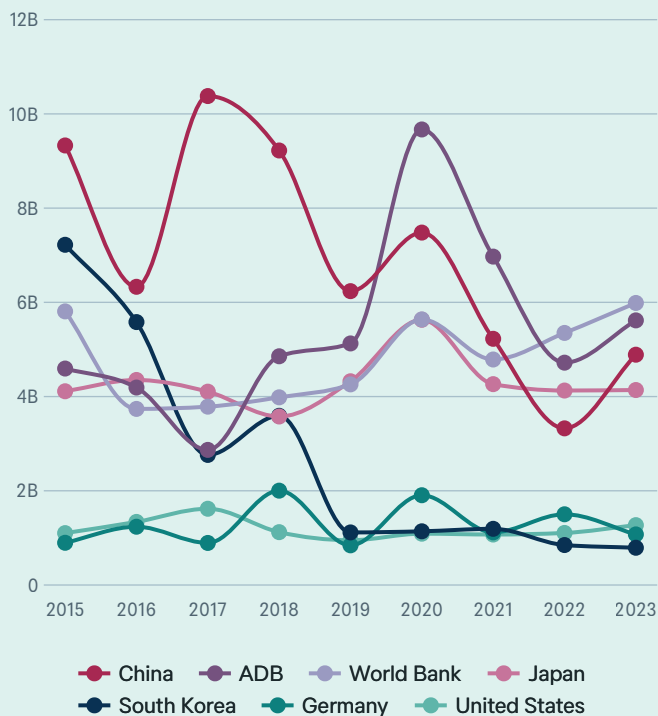
By contrast, Western alternative infrastructure offerings have effectively failed to materialise in recent years. Similarly, **Western promises to support the region's clean energy transition have yet to translate into more projects on the ground** — of global concern given coal-dependent Southeast Asia is a major source of rapidly growing carbon emissions.

Despite a negative outlook, there are some important positive trends to be found in the data: **a growing share of ODF incorporates climate change, gender equality, and disability inclusion objectives**. A critical question is how the Trump administration will approach and seek to influence the agendas of the multilateral development banks, which have led the way thus far on climate and social inclusion objectives in regional development.

THE SOUTHEAST ASIA AID MAP IN FOUR CHARTS

1. Development finance rebounded modestly in 2023 due to an uptick in multilateral development bank and Chinese spending

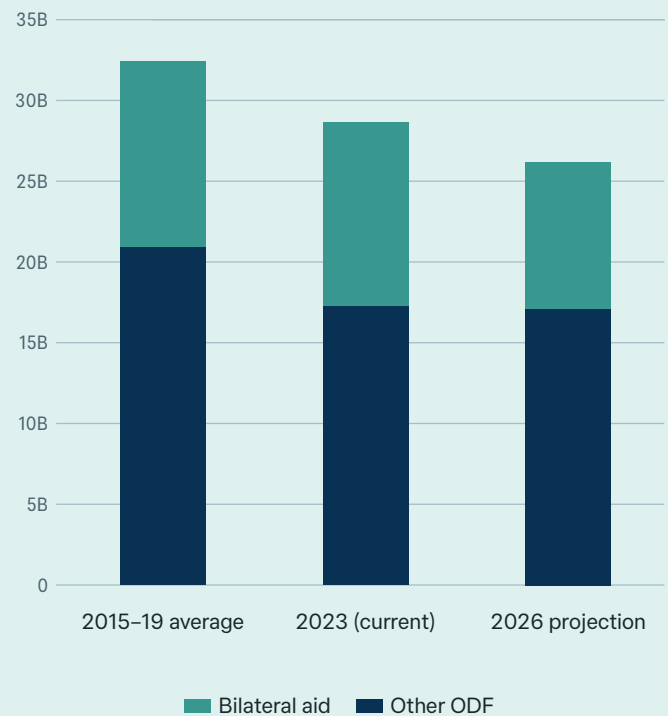
Official development finance to Southeast Asia
Spent, constant 2023 US\$



In 2023, official development finance to Southeast Asia rose slightly to \$29 billion, driven largely by increased non-concessional loans from the World Bank, Asian Development Bank, and China to larger economies, while concessional loans and grants stagnated, hitting the region's poorest countries in particular.

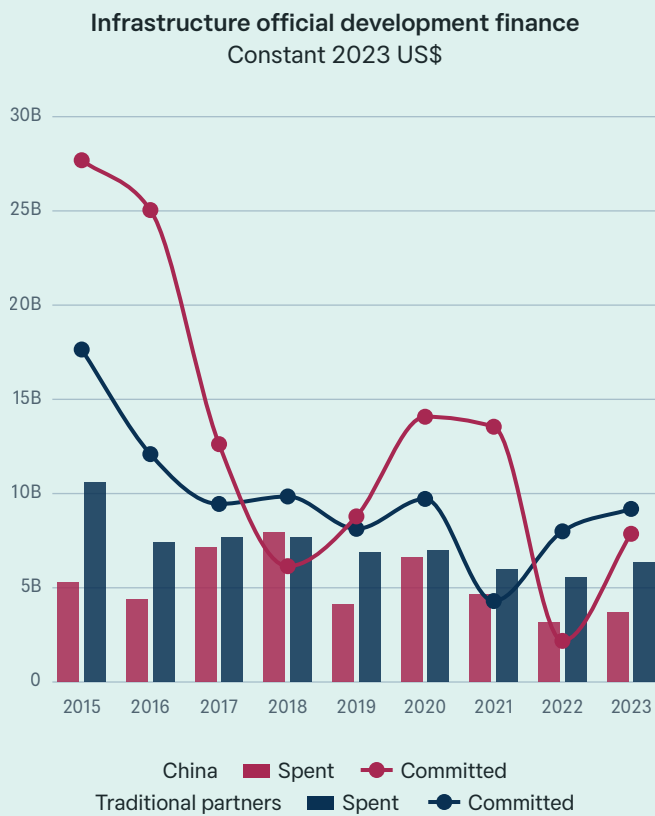
2. Looming Western aid cuts will see development support to the region dwindle in coming years

Official development finance, actual and projected
Spent, constant 2023 US\$



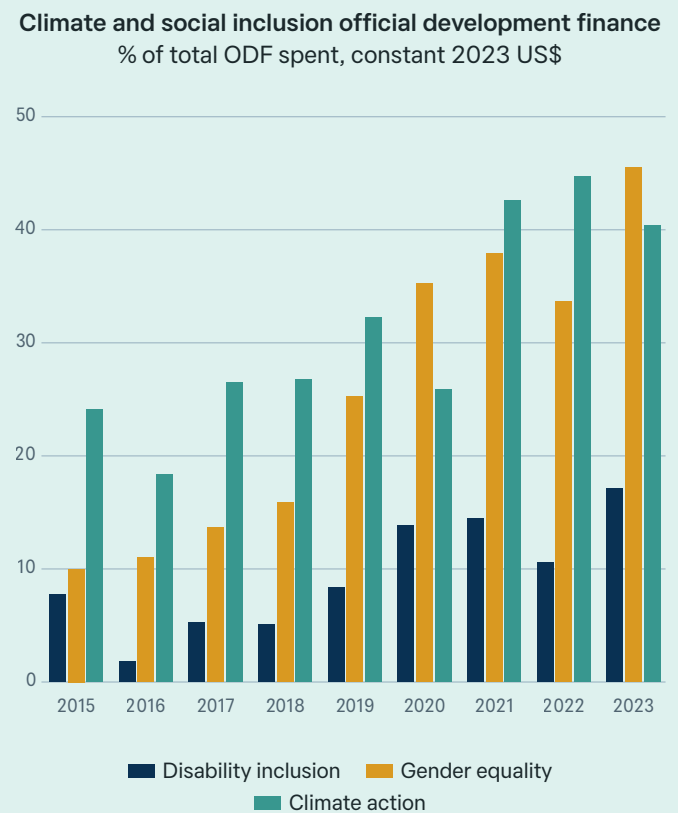
The United States and a number of European governments are pulling back from international development cooperation, potentially pushing regional development finance flows to a new low by 2026 and threatening critical funding for the region's most vulnerable countries and sectors.

3. Southeast Asia's infrastructure race is slowing down as Western initiatives fail to materialise and China recalibrates its strategy



Spending on infrastructure by both China and traditional development partners has slowed. So too have project commitments, indicating reduced future financing. Reduced financing for clean energy is especially concerning given the region's growing emissions.

4. Climate and social inclusion support are improving but at risk



There has been progress in aligning development finance with Southeast Asia's climate, gender, and disability needs. But looming aid cuts and backlash from the Trump administration in the United States could derail this progress.

UNDERSTANDING OFFICIAL DEVELOPMENT FINANCE

Official Development Finance (ODF)

Public funds for the promotion of the economic development and welfare of developing countries. ODF combines financing from two separate categories:

Official Development Assistance (ODA)

- Public or official source
- For the purpose of development
- Concessional

ODA consists of grants (donations that do not have to be paid back) and concessional loans (below market rate and on terms favourable enough to contain a substantial **grant equivalent**).

ODA is primarily provided to low-income countries with little capacity for repayments, or for projects that are unlikely to generate commercial returns.

Other Official Flows (OOF)

- Public or official source
- For the purpose of development
- Semi- or not concessional

OOF consists of financial instruments that do not meet ODA criteria. In Southeast Asia, it mostly includes loans that are provided on a semi- or non-concessional basis, meaning the finance is not on favourable enough terms to contain an adequate **grant equivalent**.

OOF is most commonly extended to middle-income countries with capacity for repayment.

Standards of concessionality are defined by the OECD's "grant equivalent". The income level of a recipient country determines the grant equivalent threshold. For example, for a transaction to a low income country to be considered ODA, the grant element must be 45%, while the threshold is 15% for a lower-middle income country, and 10% for an upper-middle income country.

Development partners explained

In terms of development finance, partners are commonly separated into two categories:

Traditional development partners

Southeast Asia's traditional partners are governments, organisations, or entities that have a long-standing history of providing assistance and support to the region. These partners typically include established development partner countries such as the United States and Australia, international organisations such as the United Nations, and multilateral development banks such as the Asian Development Bank and the World Bank.

Non-traditional development partners

This group includes emerging partners who are not members of the OECD's Development Assistance Committee, such as China, Saudi Arabia, Qatar, India, and Russia, as well as multilateral entities where non-traditional partners play a key role in their governance, such as the Asian Infrastructure Investment Bank and the Islamic Development Bank.

1. Regional development support increased modestly in 2023 but remained below pre-Covid levels

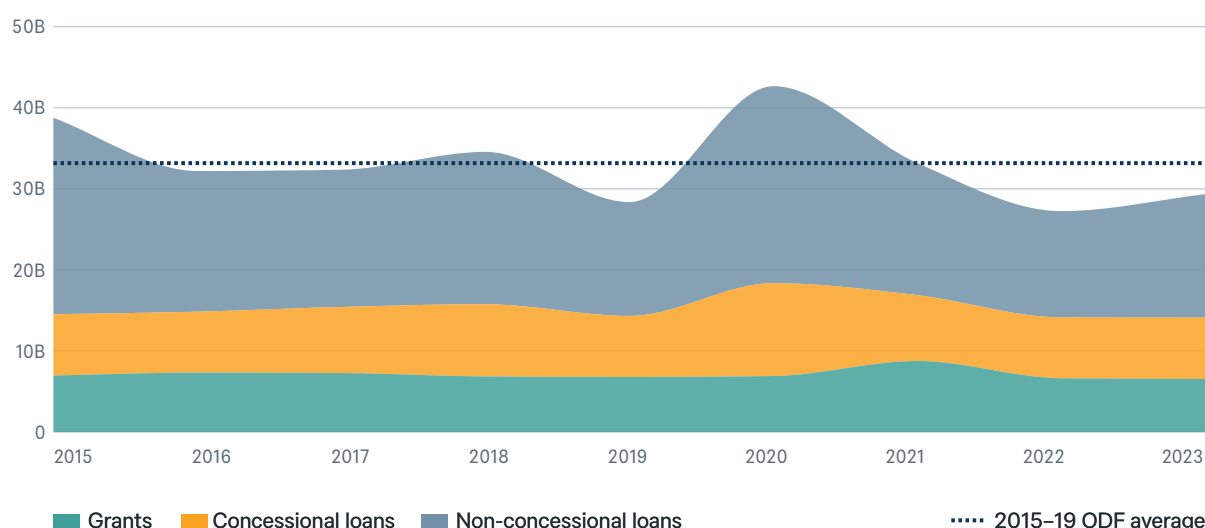
In 2023, total ODF to Southeast Asia grew slightly to reach \$29 billion, up marginally from \$26.5 billion in the previous year. However, the region's ODF remains well below pre-pandemic levels. The uptick in ODF during 2023 was largely driven by the region's largest development partners. China ramped up disbursements by almost 50% compared to 2022, accelerating the implementation of major infrastructure projects such as the Jakarta–Bandung High-Speed Rail in Indonesia and the East Coast Rail Link in Malaysia. The multilateral development banks (MDBs) also increased their ODF disbursements, providing substantial budget support especially to the region's major economies to assist with managing the longer-term economic fall-out of the Covid-19 pandemic. The United States and France increased their contributions as well, though on a smaller scale. Meanwhile, contributions from other donors declined as a group, led by a steep 28% drop in funding from Germany, the largest bilateral European development partner in the region.

The modest year-on-year lift in total ODF in 2023 was driven by an increase in non-concessional loans. These loans make up more than half of the region's development finance and primarily benefit the larger regional economies that are better equipped to absorb them. In 2023, they were heavily directed towards infrastructure — from China and the MDBs — but also increasingly used to promote financial sector reform and inclusive post-pandemic recovery. Funding for banking and financial services — that is, activities that support the development, regulation, and accessibility of financial systems and institutions — surged by 84% in comparison to 2022, reaching a record \$3.4 billion, largely driven by the MDBs and Germany. Over the longer term, however, non-concessional lending has been trending down since 2015, the first year covered by the Southeast Asia Aid Map, reflecting shrinking Chinese financing as Beijing reined in its Belt and Road Initiative and adopted a more targeted approach.

Grants and concessional loans (ODA) have been largely stable since 2015, outside of a spike during the pandemic. However, ODA is set to decline amid sharp cuts to foreign aid by major Western donors.

Financing to Southeast Asia increased modestly in 2023

ODF spent, constant 2023 US\$



2. US, EU, and UK aid cuts could see official development finance to the region decline by more than \$2 billion in coming years

Since the end of the Southeast Asia Aid Map reporting period in 2023, many major Western donors have chosen to step back from international development efforts. In 2024, seven European governments (France, Germany, the Netherlands, Sweden, Finland, Austria, and Italy) and the European Union announced \$17.2 billion in foreign aid (ODA) cuts to be implemented between 2025 and 2029.¹ Even more notable has been the reduction by the United States, with the Trump administration in early 2025 abruptly halting around \$60 billion — the majority of its overseas aid.² The United Kingdom followed, announcing reductions in annual ODA of around \$7.6 billion.³

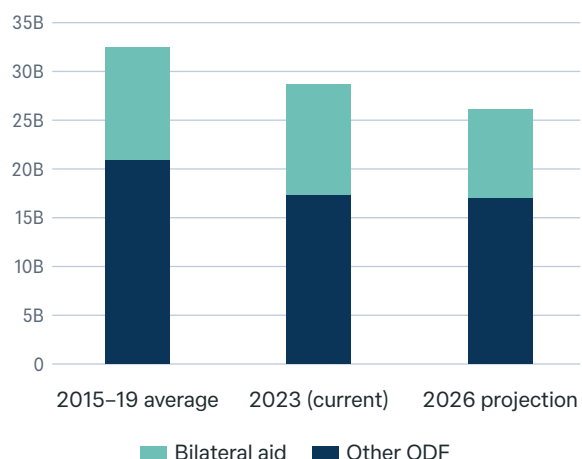
These cuts will hit Southeast Asia hard. Between 2015 and 2023, Team Europe, the United States, and the United Kingdom together contributed about one-third of all ODA to Southeast Asia, with a particular focus on humanitarian and social sector priorities such as health, education, and civil society support.

Based on current budget documents, public announcements, and calculations by other researchers, we estimate that total ODF to Southeast Asia could decline by 8% or more than \$2 billion, falling to \$26.5 billion by 2026. This projection is driven by a 20% expected decline in bilateral aid (ODA) from \$11.3 billion in 2023 to \$9 billion in 2026, while assuming other financing flows remain stable. Bilateral aid per capita would fall from \$16 to \$13, or by about 22%.

For each donor, we assume ODA flows will remain steady at the level of already announced or expected cuts. The United States is expected to slash its foreign assistance by 83% in 2025.⁴ Annual ODA from Team Europe is expected to see a 20% decline. Germany, the largest EU donor, reduced its aid program by 13% in 2024, and its newly elected conservative government has indicated further cuts to public spending. France, the EU's second-largest donor, reduced its ODA by 11% in 2024⁵ and is on track for a possible 40% cut in 2025.⁶

Asian donors are expected to maintain relatively stable ODA flows. Japan reduced its aid by 6% in 2024 but is expected to keep its funding steady thereafter. South Korea is projected to increase its ODA disbursements by 2% annually from 2024 onwards. Meanwhile, we expect Chinese aid to remain stable in the near future.

Official development finance, actual and projected
Spent, constant 2023 US\$



Bilateral donors becoming much less generous
Per capita bilateral ODA spent, constant 2023 US\$

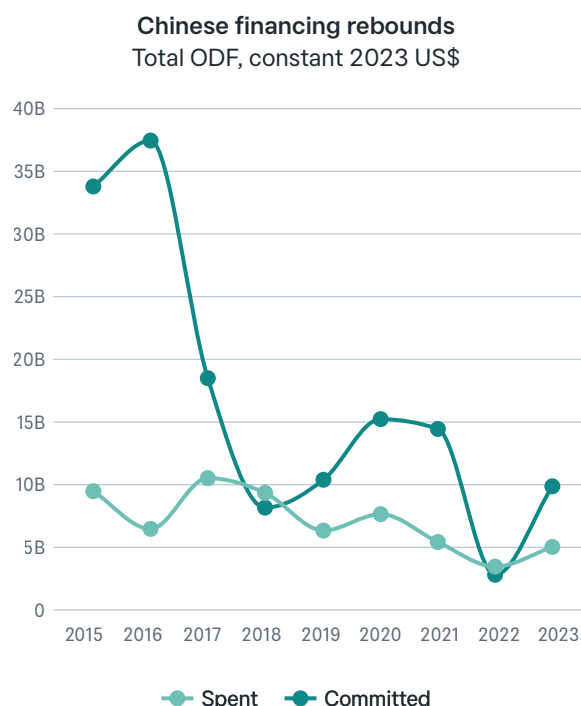


3. Western aid cuts and rising trade tensions will reduce Southeast Asia's development choices and risk ceding ground to China

Declining Western aid risks ceding a greater role to China, though other Asian donors will also gain in importance. Chinese ODF reached its lowest recorded levels in 2022 but rose by \$1.6 billion to reach \$4.9 billion in 2023. This was mostly driven by disbursements in large economies such as Indonesia and Malaysia, reflecting major infrastructure projects including the Jakarta–Bandung High-Speed Rail and Malaysia's East Coast Rail Link. Despite challenges with many projects, China retains a substantial pipeline of infrastructure works that will maintain its presence as the region's largest infrastructure financier.⁷ In 2023, China also finalised the revival of the Kyaukphyu Deep Sea Port project under the China–Myanmar Economic Corridor framework, resulting in a fourfold rise in the dollar value of new project commitments, from a low of \$2.5 billion in 2022 to almost \$10 billion in 2023.

ODF from Asian donors is expected to remain broadly stable in the near term. Aid cuts by major Western donors will therefore see the centre of gravity in Southeast Asia's development finance landscape drift towards Asian donors. This comes after several years in which Western donors had been improving their relative importance in the region, especially as China's ODF contracted from its earlier highs. In future, development finance in Southeast Asia will be increasingly shaped by Tokyo, Seoul, and Beijing, leaving Brussels and Washington with a diminished role. China could gain in importance, especially in the Mekong subregion as well as in Indonesia.

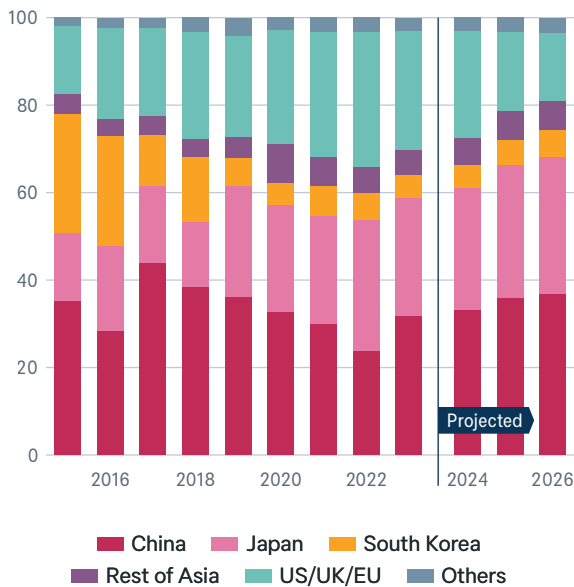
China's development financing carries its own important nuances.⁸ Rising nationalism, political volatility, and growing concerns over debt sustainability in many Southeast Asian countries have led to increased scrutiny of Chinese-funded projects. China is adjusting by refining its ODF and transitioning to fewer, smaller, and more targeted projects. Indonesia, Malaysia, and Thailand are navigating China's development finance opportunistically — seeking, accepting, and rejecting projects based on their own



priorities and needs. Lower-middle income economies such as the Philippines and Vietnam have taken a more restrained approach, engaging with China only when it aligns with domestic priorities. Poorer economies such as Cambodia, Laos, and Myanmar, which have limited access to alternative financing, remain heavily reliant on China and have much less room to negotiate.

In this environment, reduced ODF from Western governments will shrink the pool of development financing options for Southeast Asian countries, leaving them with reduced room to manoeuvre and less leverage to negotiate favourable terms with Beijing. This is unfolding at a time of growing external pressures: the Trump administration's new "reciprocal tariff" regime has reignited global trade tensions, potentially hitting Southeast Asian exports hard and destabilising key industries. As both aid and trade ties with the West weaken, many countries in the region may find themselves with limited alternatives and increasingly dependent on China, despite their efforts to diversify.

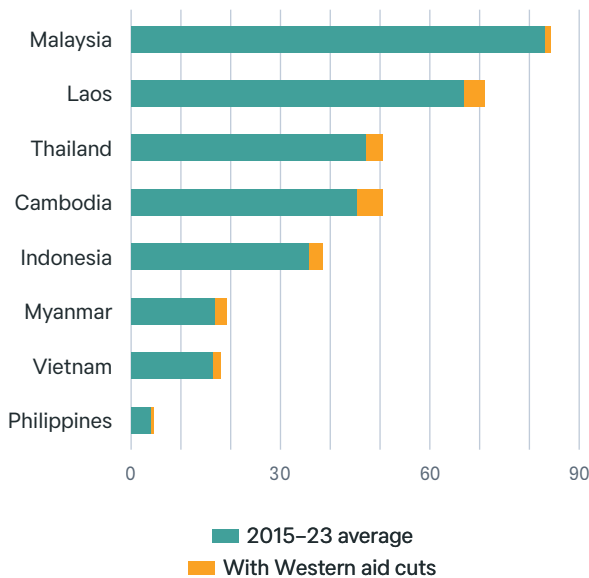
Aid influence shifts from the West to Asia
ODF share per donor, spent, constant 2023 US\$



This poses three key risks. First, the ability of South-east Asian countries to recalibrate their development partnerships and assert greater agency may be undermined. Second, the lack of competition could reduce the pressure put on China to reform the Belt and Road Initiative to address existing concerns about debt sustainability and project quality. Third, as global development budgets shrink, remaining funding is more likely to be geared towards serving donor interests, not necessarily the region's development needs. This will further challenge Southeast Asian countries' agency to channel financing to their domestic development priorities.

Taken together, these trends risk eroding Southeast Asia's bargaining power and ability to shape the development support that countries receive.

China gains ground as Western aid declines
China's share of total bilateral ODF



4. Aid cuts will also deepen a development divide, with poorer countries and social sector priorities falling behind

The consequences of recent aid cuts are far from uniform, but they are likely to hit the region's poorer and more aid-dependent economies the hardest, along with sectors where Western donors have traditionally played a leading role.

In larger economies such as Indonesia, Thailand, Malaysia, the Philippines, and Vietnam — where aid is small relative to the country's own resources, and non-concessional lending plays a major role — the effects will be less significant. Although development support for important social sector priorities could be significantly affected.

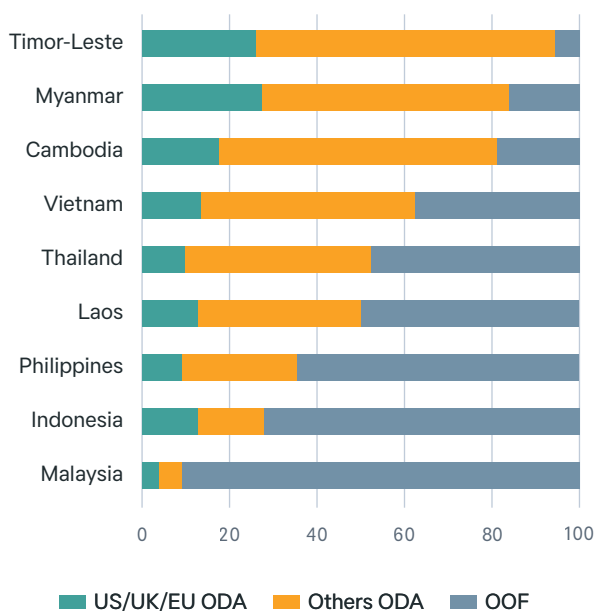
By contrast, smaller and more aid-dependent nations are far more exposed. Between 2015 and 2023, foreign aid (ODA) made up 95% of total official development finance in Timor-Leste, 84% in Myanmar, and 81% in Cambodia. In those economies, Western

ODA is particularly important for human development activities. In Laos, for instance, education ODA from the United States, United Kingdom, and European Union is equivalent to 22% of the government education budget,⁹ and health ODA from those donors is equivalent to 11% of the country's health spending.¹⁰

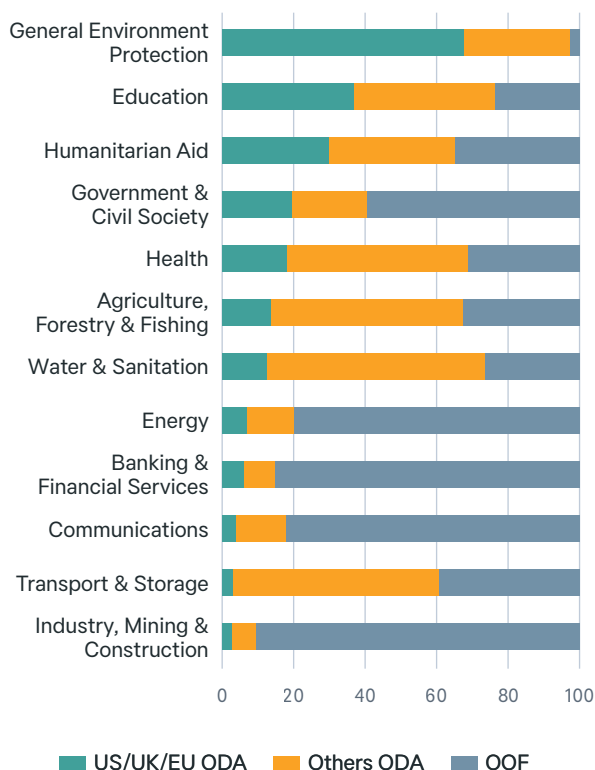
Across the region, Western aid cuts risk harming progress in health, education, and general environmental protection. Aid from the United States, United Kingdom, and European Union plays an outsized role in these sectors, funding 68% of biodiversity and environmental development projects, 37% of education, and 18% of health. Alarming, these donors also account for about two-thirds of development funding for civil society. Reductions in Western aid will disproportionately impact these critical sectors.

Humanitarian support, while somewhat protected from US cuts, also faces headwinds. Team Europe, responsible for about 25% of humanitarian aid, is seeing

Major donor aid cuts risk hitting poorest countries the hardest
ODF share by donor group, cumulative 2015–23



Western donors' share of ODF by sector
ODF share by donor group, cumulative 2015–23

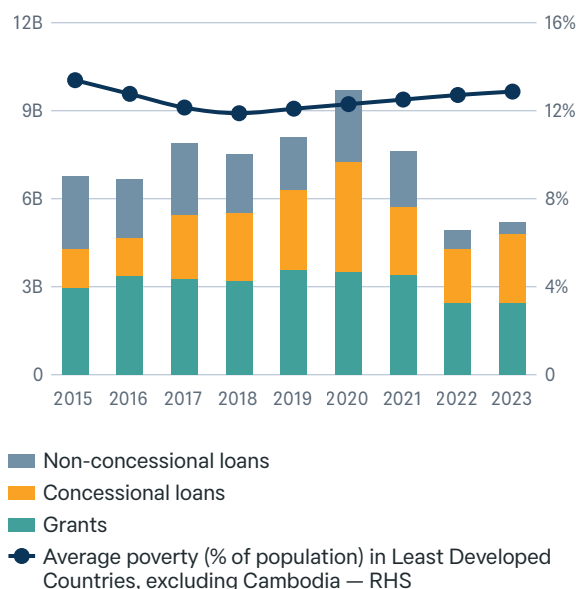


major cutbacks from key players such as Germany and France.¹¹ Asian donors provide roughly 34%, with their support remaining relatively stable for now.

Southeast Asia's poorest countries — Cambodia, Laos, Myanmar, and Timor-Leste — have already lost out the most amid stagnating ODF to the region, despite facing high and rising poverty. Total ODF flows to these countries have almost halved since 2020, falling from \$9.8 billion in 2020 to just \$5.2 billion in 2023. This has occurred even as these countries have faced higher rates of extreme poverty, with World Bank estimates for the share of people living below \$2.15 PPP¹² per day having risen in Laos, Myanmar, and Timor-Leste (estimates for Cambodia are not available).

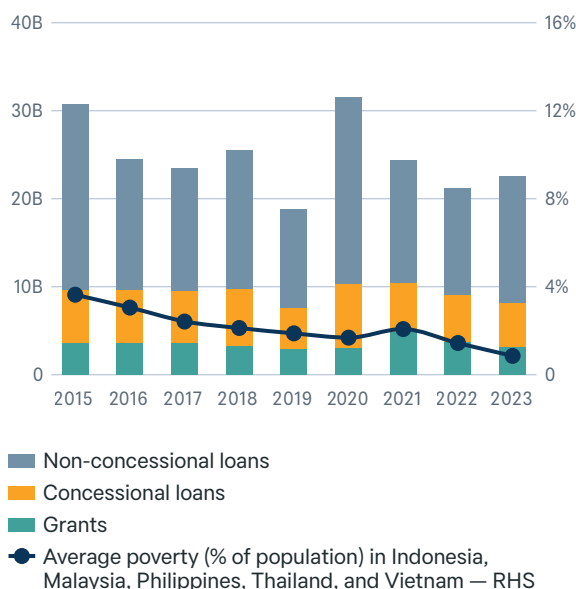
Lower income Southeast Asian economies receive less ODF despite rising poverty

Spent, constant 2023 US\$



Higher income Southeast Asian economies attract more ODF funding

Spent, constant 2023 US\$



Note: Lower income Southeast Asian economies are Laos, Myanmar, and Timor-Leste. Internationally comparable poverty data is unavailable for Cambodia. Higher income Southeast Asian economies are Indonesia, Malaysia, the Philippines, Thailand and Vietnam. Source: World Bank, Lowy Institute Southeast Asia Aid Map 2025

Equally troubling is that the decline in ODF to these countries mostly reflects a reduction in aid, though non-concessional loans have also declined sharply. Concessional loans to lower income countries have fallen from more than \$3.7 billion in 2020 to \$2.4 billion in 2023, though they remain slightly above the pre-pandemic average. More concerning is the sharp decline in grant funding, which has fallen by one-third since 2020 and is now 25% below pre-pandemic levels. Two main factors explain this trend: Myanmar's 2021 military coup, which led most development partners to withdraw; and Laos' mounting debt burden, which is affecting its access to even concessional finance. Only Japan, China, and the United States remain engaged in Myanmar. Meanwhile, Cambodia has seen increased support from traditional donors and steady backing from China. Aid to Timor-Leste has remained relatively stable.

By contrast, development support to the region's stronger developing economies — Indonesia, Vietnam, and the Philippines — is steady, while poverty in these countries has continued to decline. The composition of ODF to these stronger economies has also remained stable in terms of grants, concessional loans, and non-concessional loans.

The result is a deepening development divide: Southeast Asia's higher income countries are capturing the lion's share of international ODF, while lower income nations are being left behind despite pressing needs. If the current trajectory continues, especially amid Western aid cuts, this divide will become more entrenched, undermining the region's long-term stability, equity, and resilience.

5. Southeast Asia's infrastructure race has slowed to a crawl

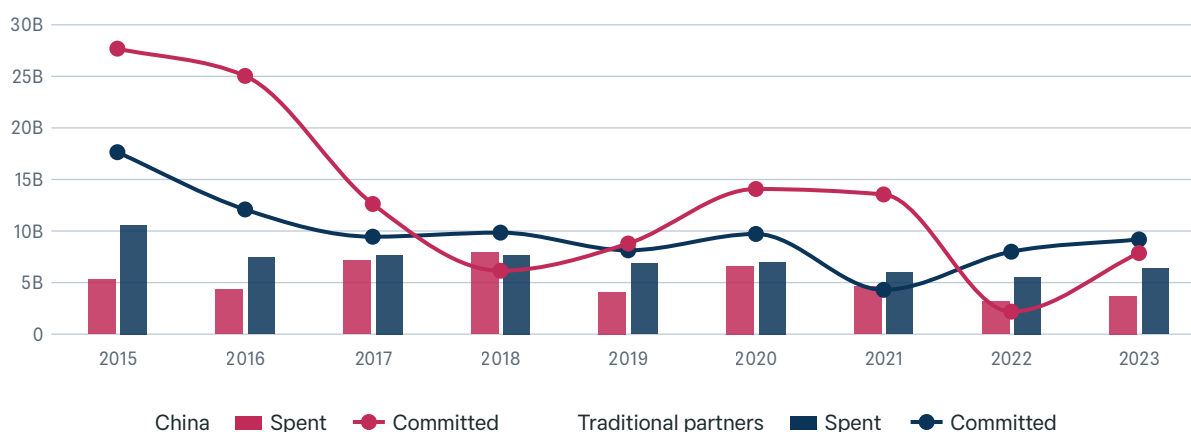
Despite much grand rhetoric, infrastructure competition in Southeast Asia has largely failed to heat up — settling more into a simmer than a boil. Tightening infrastructure competition has reflected a slowdown in Chinese spending rather than a rise in alternative offerings. Beijing is recalibrating its approach, shifting towards fewer, smaller, and more targeted infrastructure projects. In 2023, China financed just 17 projects worth \$3.5 billion, a 17% increase from 2022 but still far below the 67 projects and \$5.2 billion recorded in 2015. Meanwhile, key platforms intended as the West's answer to the Belt and Road Initiative, such as the Global Gateway and the Just Energy Transition Partnerships, have had little impact to date.

Infrastructure financing from traditional partners has remained stagnant, despite years of announcements from Western groupings such as the G7, Quad, and European Union.¹³ Total infrastructure financing from traditional sources (Europe, the United States, Japan, South Korea, and the MDBs) was just \$3.8 billion in 2023, 35% less than the pre-pandemic average of \$5.9 billion. Nor has there been an acceleration in pipeline project financing, with new commitments from traditional donors ticking up slightly to \$9.2

billion in 2023 but still much below the pre-pandemic average of \$12 billion. Moreover, the vast majority of infrastructure financing from traditional partners has continued to come from the MDBs, Japan, and South Korea. European donors have played a modest role, providing around \$600 million in infrastructure financing in 2023. The roles of the United States and United Kingdom remain miniscule, at just \$59 million and \$6 million respectively.

Aid cuts will further weaken the ability of major Western donors to compete with China in the infrastructure space, especially in more ODA-reliant economies such as Cambodia, Laos, Myanmar, and Timor-Leste. This trend is set to continue unless development finance institutions such as the US International Development Finance Corporation, British International Investment, and other European equivalents can increase project transactions in these lower income contexts — which has thus far proven difficult — or scale up their concessional financing. Meanwhile, China retains an infrastructure pipeline of some \$70 billion in planned spending, suggesting Beijing is well positioned to maintain its role as the region's leading infrastructure financier.¹⁴ Overall, however, meeting the huge infrastructure financing gap facing the region — estimated at around \$2.8 trillion¹⁵ — will likely become even harder.

China vs traditional partners on infrastructure spending
Constant 2023 US\$



6. The region's energy transition is dangerously underfunded, with global implications

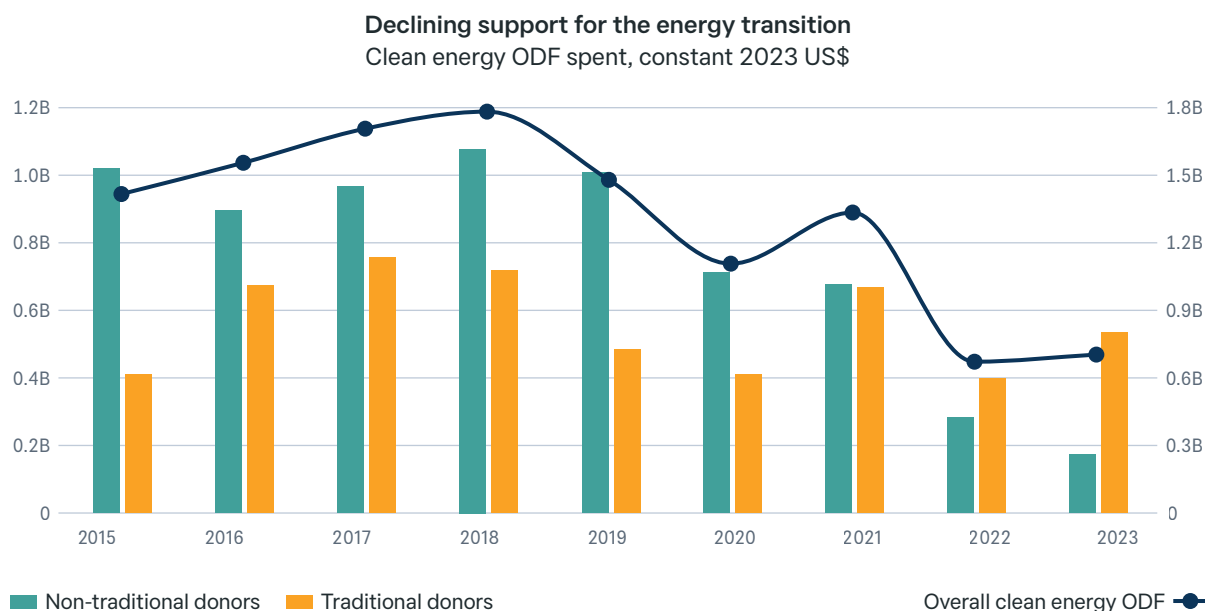
Donors are falling particularly short when it comes to supporting Southeast Asia's clean energy transition, with ODF for clean energy in decline over recent years. This is of global significance. Energy production in Southeast Asia is heavily dependent on coal, and its fleet of coal-fired power plants is relatively young. The International Energy Agency (IEA) projects the region will account for about 25% of future global energy demand growth to 2035.¹⁶

Without faster decarbonisation, this will be associated with a similarly large increase in carbon emissions and see Southeast Asia's emissions become more than 60% higher than those projected for the European Union, and three-quarters as high as those for the United States. To avert this trajectory, annual clean energy investment in Southeast Asia needs to quadruple from current levels to \$130 billion by 2030.¹⁷

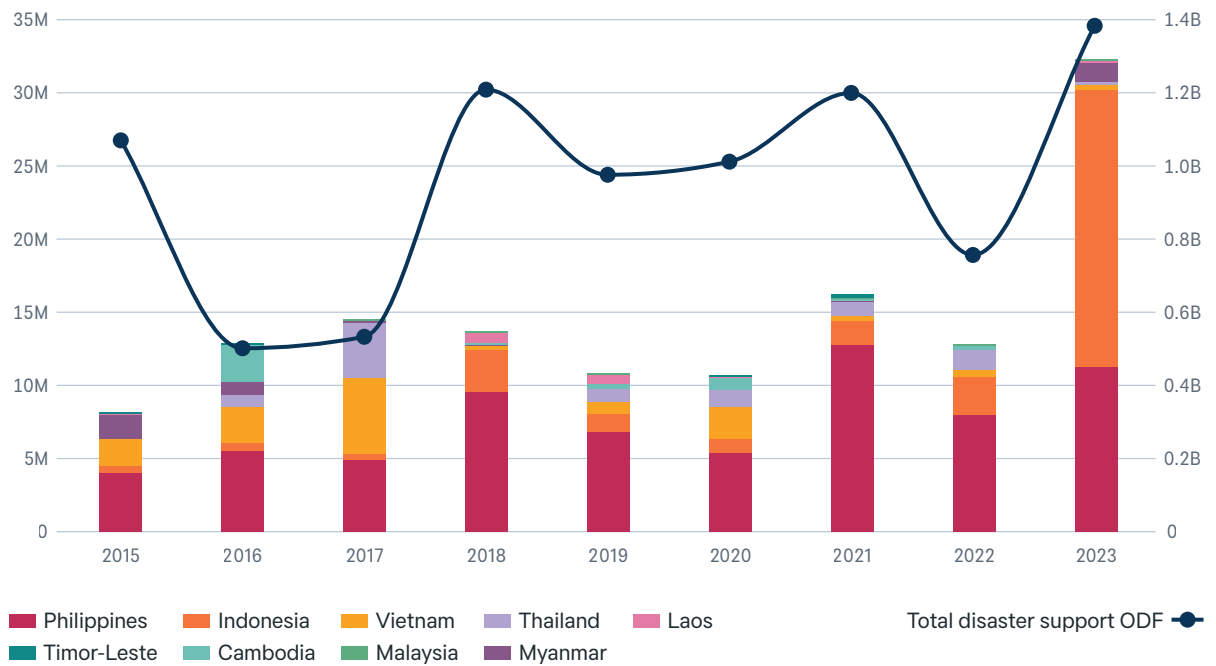
However, ODF support for clean energy has declined markedly since 2018 largely due to a slowdown in

Chinese lending to debt-distressed Laos for large hydropower dam projects. Although two plants remain under construction and continue to receive disbursements, overall funding is tapering off. The efficacy of much of this investment is also dubious, with Chinese financing having created billions of dollars in overcapacity in Laos' domestic energy market — as detailed in the Lowy Institute's 2025 report, *Trapped in Debt: China's Role in Laos' Economic Crisis*.¹⁸

Meanwhile, traditional development partners have made big promises for additional clean energy financing. Most notable are the Just Energy Transition Partnerships deals signed in 2022 between Indonesia and Vietnam with G7 countries and other partners, worth \$20 billion and \$15 billion respectively. Yet 2023 saw the lowest level yet of clean energy ODF in Southeast Asia at less than \$710 million — down from \$1.7 billion in 2018, and equivalent to just 6% of the \$12 billion the IEA thinks is needed annually from development partners by the early 2030s.¹⁹ Worse, the IEA figure is for concessional finance, and on that measure, the international community provided just 2% of what is required, with the rest being provided as non-concessional loans.



Extreme weather events and disaster relief
Number of people affected vs spent, constant 2023 US\$



Source: The Centre for Research on the Epidemiology of Disasters, Lowy Institute Southeast Asia Aid Map 2025

Traditional partners — led primarily by the MDBs and Japan — account for 42% of total clean energy ODF since 2015, averaging \$550 million per year. In 2023, there was a modest uptick due to increased World Bank support for clean energy projects in the Philippines and Vietnam. Annual commitments from traditional donors have remained relatively stable, averaging around \$740 million, potentially indicating a turning point or mild recovery in the years ahead.

In contrast, commitments from non-traditional donors have been mostly uneven. Driven largely by Chinese hydro projects in Laos, they have dropped sharply since the last major commitment in 2018, averaging just \$100 million per year since then.

Overall development financing for clean energy has been declining since 2018 with little sign of a new

pipeline of projects being built up. Instead, recent Western aid cuts could worsen the trend given Team Europe and the United States currently account for about 20% of ODF for clean energy.

Lacklustre support for the region's clean energy transition has been punctuated by record high assistance for extreme weather events. In 2023, the number of people affected by extreme weather events and natural hazards was more than double the 2015–22 average, driven by Typhoon Doksuri/Egay in the Philippines, Cyclone Mocha in Myanmar, and severe droughts in Indonesia. Development partners, especially the World Bank, the United States, and the UN's Central Emergency Response Fund, reacted with a surge in emergency relief.

7. Progress on climate and social inclusion may come under pressure

Southeast Asia’s traditional development partners are increasingly incorporating greater climate change mitigation and adaptation, gender equality, and disability inclusion objectives into their projects. However, shifting priorities under the Trump administration in the United States threaten to derail this progress.

Climate financing

Despite a donor focus on climate change objectives, clean energy typically only accounts for around 15% of this climate funding. The remainder is focused on a diverse range of climate change mitigation and adaptation initiatives, including forestry management, financial sector projects to increase access to green finance, governance programs to improve disaster resilience, and the building of climate-resilient infrastructure.

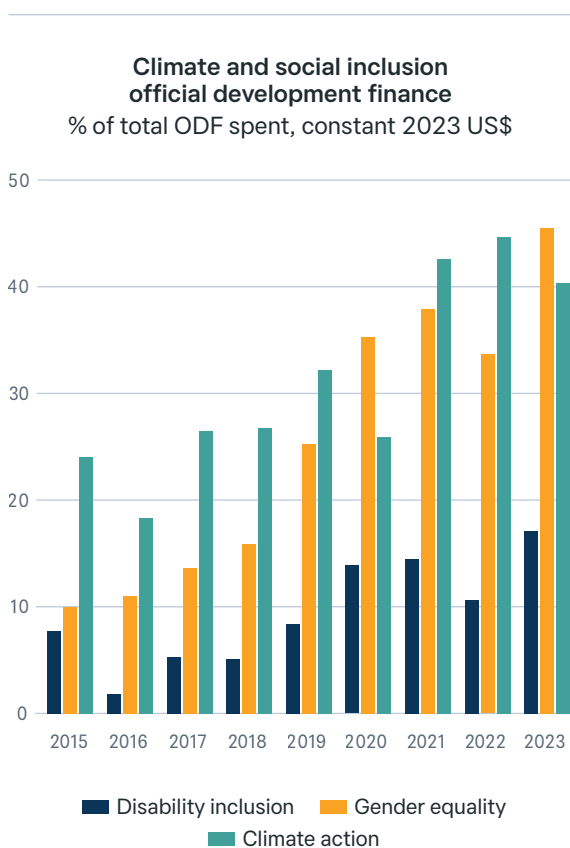
Over the past decade, ODF incorporating climate objectives has steadily increased, both in absolute terms and as a share of total ODF. Between 2015 and 2023, climate-related funding grew from \$9 billion to \$11.5 billion, rising by an average of 6% per year. In 2023, that represented 40% of total ODF to the region. That year, there was a small dip in total climate ODF. This was primarily driven by a reduction in Japanese funding, while that from most other major partners saw an increase.

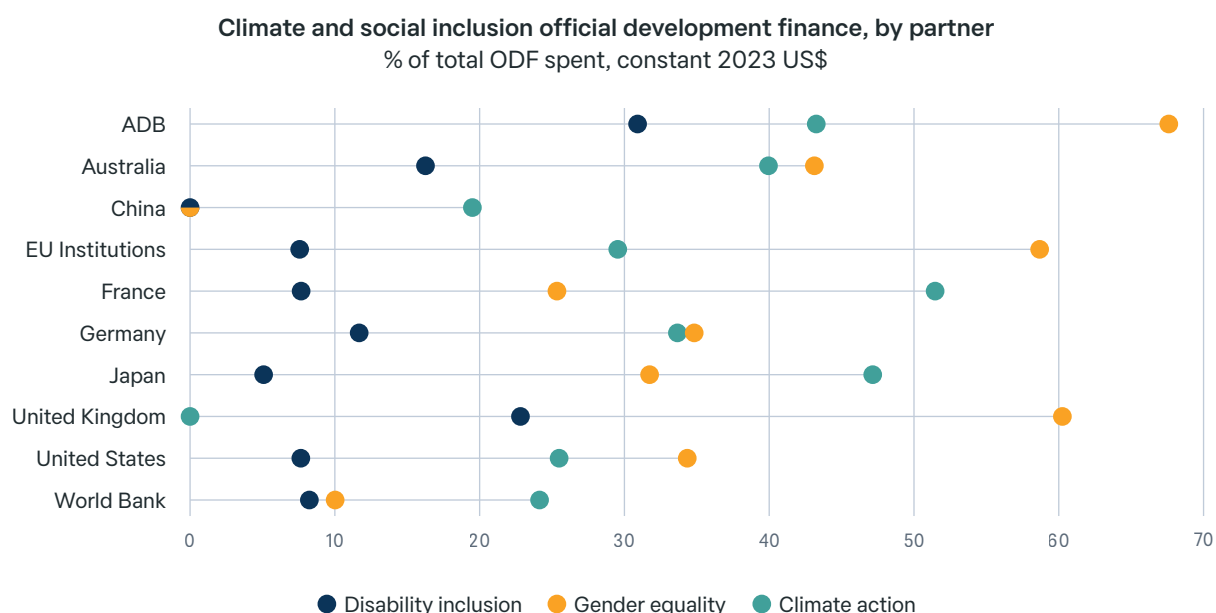
Most of the growth in climate ODF has come from projects where climate objectives are classified as a “significant” rather than “principal” objective, meaning climate considerations have been integrated into broader development projects instead of being the primary focus of the investment. For example, climate action is increasingly identified as a “significant” goal in the policy triggers attached to multi-billion-dollar budget support loans. This has allowed ODF targeting climate objectives to grow even as projects with a “principal” climate objective, such as renewable energy generation, have declined.

In 2023, funding for projects with climate as the “principal” objective declined in both absolute and proportional terms, representing just 13% of total climate finance — the second-lowest share in the past decade

after 2020, when funding focus was switched towards Covid-19 related support.

The Asian Development Bank (ADB) estimates South-east Asia requires \$210 billion annually for climate-resilient and low carbon infrastructure investment.²⁰ Based on historical patterns, multilateral and bilateral development finance typically account for around 65% of climate finance, implying an expected ODF contribution of \$136.5 billion per year — unless private and domestic public investment were to grow dramatically.²¹ However, ODF investment in infrastructure projects with climate goals remains low and fell from \$4.5 billion in 2022 to under \$4 billion in 2023 — less than 3% of that needed, based on the ADB estimate. While Japan and the ADB have stepped up support for climate-sensitive rail, subway, and urban commuter projects, serious funding gaps remain in water, energy, and communications infrastructure.





Social inclusion financing

This year, for the first time, the Southeast Asia Aid Map online database includes a unique tag and filter to identify projects that integrate disability inclusion as an objective. The methodology is based on the OECD Development Assistance Committee's disability inclusion marker, and includes estimates for the 77 development partners (out of 106) in the Aid Map database who either do not use the marker or do not report to the Organisation for Economic Co-operation and Development (OECD). On a similar basis, the Southeast Asia Aid Map already includes a tag and filter for projects incorporating gender equality objectives.

The MDBs have led the charge for the integration of disability inclusion and gender equality objectives into their activities. However, over-reliance on the MDBs for this kind of support is now a vulnerability.

The proportion of total ODF to Southeast Asia that integrates disability inclusion targets has risen steadily from 8% (\$818 million) in 2015 to 17% (\$4.5 billion) in 2023, with more than 70% of that support coming from the MDBs, especially the ADB (54%). The story is

the same for gender equality funding. The proportion of total ODF to the region incorporating gender equality objectives hit a record high in 2023 at 45%, or \$13 billion, with the MDBs (especially the ADB) the source of more than two-thirds of this funding, followed by major bilateral partners Japan, Germany, and the United States.

The intersection of policy markers across climate, gender equality, and disability inclusion represents a new frontier in ODF provision and measurement. Around 14% of total ODF in 2023 integrated all three policy goals to some extent.

There are storm clouds on the horizon, however. The MDBs are currently the largest source of ODF support for climate, gender equality, and disability inclusion. The United States is the largest and second-largest shareholder at the World Bank and ADB respectively. Pushback against climate and inclusion objectives from the Trump administration and its scepticism towards multilateralism could have major consequences for ODF support for climate action and social inclusion in the region.

Country profiles

BRUNEI

\$1B SPENT	\$1B COMMITTED	31 PROJECTS	99% STATUS
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Brunei is a high-income country, one of only two in Southeast Asia. Brunei’s roughly \$15 billion GDP (2023) makes up 0.4% of the region’s GDP, and it has by far the smallest population at just 458,000. Brunei’s per capita GDP in 2023 was \$32,962, the second-highest in the region behind Singapore.

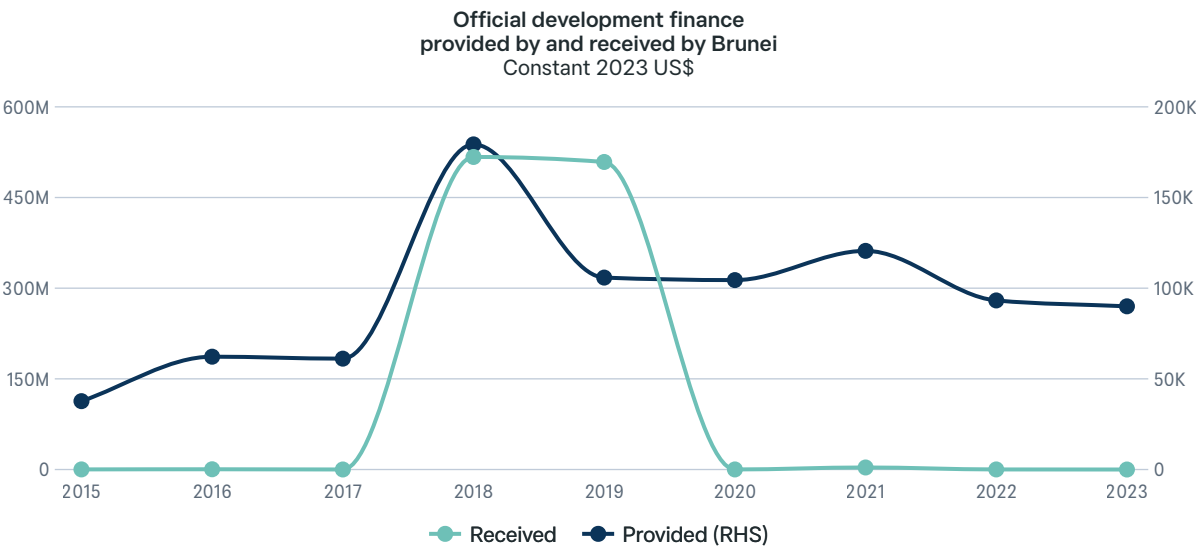
Despite its relative wealth, Brunei contributes very little to intra-regional official development finance (ODF).

Within the region, Brunei made an annual contribution to the ASEAN Coordinating Centre for Humanitarian Assistance on Disaster Management totalling \$714,259 between 2015 and 2023. In this period, it also disbursed

ODF on two other occasions: a \$100,000 grant in 2018 to aid flood victims in Laos and a donation of Covid vaccines worth \$9,227 to the Philippines in 2021.

Brunei is also a recipient of ODF. Between 2015 and 2023, it received \$1 billion, averaging \$114 million annually. China contributed 99.7% of this sum, largely due to loans from China Development Bank and Export-Import Bank of China to finance energy projects.

There was minimal integration of climate action, gender equality, or disability inclusion objectives in Brunei’s ODF.



CAMBODIA

\$21.9B

SPENT

\$32B

COMMITTED

17,496

PROJECTS

69%

STATUS

Cambodia is a lower-middle income economy according to the World Bank, and a UN-designated Least Developed Country. Its 2023 GDP of \$42.3 billion accounts for 1.1% of the regional GDP of Southeast Asia. With a population of 17.4 million, Cambodia's GDP per capita is \$2,429, the fourth-lowest in the region.

From 2015 to 2023, 17,496 aid and development projects were implemented in Cambodia by 73 development partners, totalling \$21.9 billion in official development finance (ODF).

Key trends

ODF disbursements including grants, loans, and other forms of assistance to Cambodia have grown modestly over time, with Cambodia receiving the fifth-largest volume of ODF in the region. A 2021 peak in spending of just under \$3.5 billion, mostly due to a boost in pandemic-related support, has since levelled out to an average of \$2.5 billion annually from 2015 to 2023.

ODF has fluctuated relative to Cambodia's economy, rising from 7.5% of GDP in 2015 to a high of 9.6% in 2020 and then stabilising at 6% in 2023. As one of the region's poorest economies, Cambodia's 2023 ODF to GDP ratio is the second-highest. Almost half of Cambodia's ODF is received as concessional loans, and a third as grants, with the rest non-concessional loans.

Looking ahead, new commitments to Cambodia declined in 2023 but remained slightly above pre-pandemic levels, indicating that disbursements in coming years are likely to see a modest increase.

Development partners

China, Japan, and the Asian Development Bank (ADB) have been Cambodia's primary development partners, together accounting for almost 60% of Cambodia's ODF since 2015.

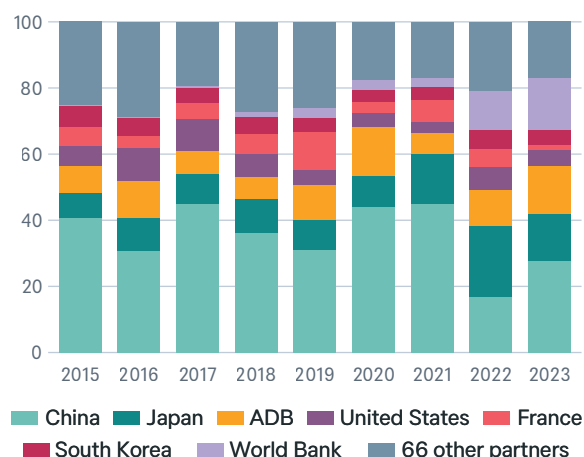
A dramatic collapse in China's spending in Cambodia in 2022 has been partially corrected by ongoing disbursements for large infrastructure projects, but 2023 levels were still lower than China's average yearly spend between 2015 and 2022. China accounted for only 28% of Cambodia's ODF in 2023, down from 45% in 2021. While China's assistance has traditionally been focused on the transport and storage and energy sectors, in 2023 agriculture, forestry, and fishing received the most support. A substantial 89% of China's support to Cambodia has been delivered through loans, of which 59% have been concessional.

Japan's contribution has grown, and while still lower than China's, it has not experienced the same volatility and is offered consistently as grants and concessional loans. Japan's long-term focus on transport and storage has been maintained, with that sector now accounting for 38% of Japan's total assistance to Cambodia since 2015.

Official development finance
to Cambodia, by transaction type
Constant 2023 US\$



Official development finance
to Cambodia, by partner
% of total ODF spent, constant 2023 US\$



The ADB’s level of support to Cambodia in 2023 is higher than in any year other than 2020, when it delivered significant Covid-19 budget support. The ADB’s spending is evenly spread through a variety of sectors, with industry, mining, and construction and government and civil society topping the list in 2023. Of all ADB assistance to Cambodia, 93% has been delivered through concessional loans.

The World Bank has massively expanded its presence in Cambodia, increasing its contributions from just \$5 million in 2015 to more than \$400 million in 2023, ensuring its place as Cambodia’s second-largest development partner in 2023. The World Bank targets its support at the government and civil society sector through concessional loans.

The rising role of the multilateral development banks in Cambodia has been supplemented by secondary donors such as the United States, South Korea, and Australia.

Sectors

The transport and storage sector has consistently received the most support from Cambodia’s development partners, with special priority awarded to road transport, particularly construction of national roads. Since 2015, transport and storage has received roughly a third of all ODF to Cambodia, above the regional average of 21%.

Since 2015, 13% of ODF to Cambodia has been spent in the government and civil society sector, predominantly for budget support, public financial management, and social protection schemes, but this amount remains below regional averages.

Agriculture, forestry, and fishing attracts 10% of total ODF to Cambodia. Spending in this sector is dominated by development of agricultural water resources.

Despite Cambodia’s energy generation and access challenges, ODF spending on energy at 6% is far lower than the regional average of 21% and it ranks as only the seventh-largest sector.

Policy goals

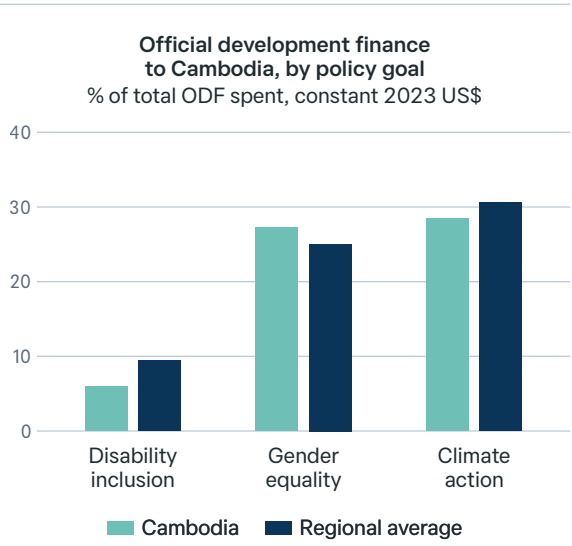
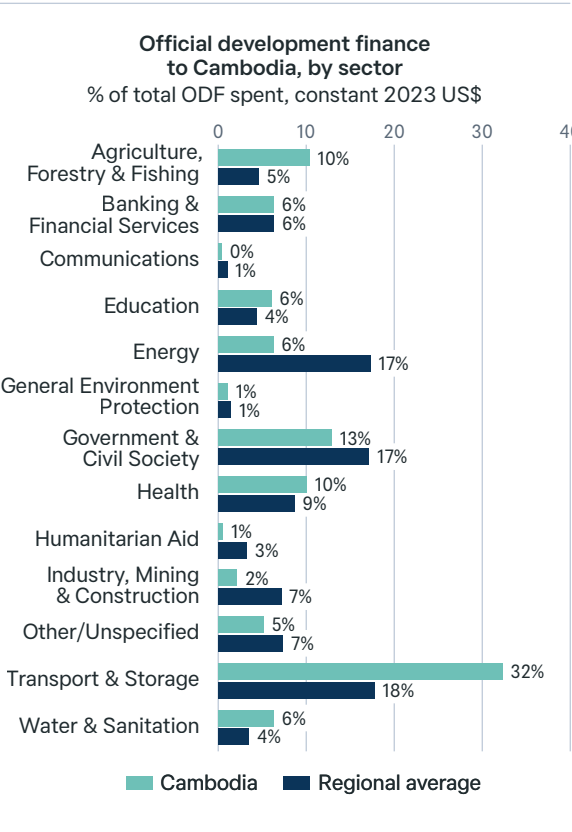
The Southeast Asia Aid Map tracks ODF with integrated policy goals across three policy domains or cross-cutting themes (as distinct from sectors): climate action, gender equality, and disability inclusion.

Cambodia has received rising levels of policy-integrated ODF. Over 2015–23, Cambodia received less than the regional average for ODF targeting disability inclusion (6%) and climate action (28%) goals.

However, it received slightly more than the regional average for ODF targeting gender equality (27%).

Provision of intra-regional ODF

Cambodia is the third-largest provider of intra-regional ODF, providing an annual average of \$900,000 over 2015–23. Cambodia’s intra-regional assistance is typically in the humanitarian aid sector, with occasional contributions in health and government and civil society. Phnom Penh has extended bilateral ODF only to its neighbours Laos, Vietnam, and Myanmar.



INDONESIA

\$100B

SPENT

\$119B

COMMITTED

20,456

PROJECTS

84%

STATUS

Indonesia is an upper-middle income economy according to the World Bank, having graduated from lower-middle income status in July 2023. Its 2023 GDP of \$1.4 trillion accounts for 36% of the regional GDP of Southeast Asia. With a population of 281 million, Indonesia's GDP per capita is \$4,876, the fifth-highest in the region.

From 2015 to 2023, 20,456 aid and development projects were implemented in Indonesia by 85 development partners, totalling \$100 billion in official development finance (ODF).

Key trends

ODF disbursements including grants, loans, and other forms of assistance to Indonesia have decreased over time, although Indonesia receives the largest volume of ODF in the region. A 2015 peak in spending of more than \$15 billion has dropped to a post-Covid (2021–23) average of \$9.2 billion annually.

ODF has fluctuated relative to Indonesia's economy, down from a high of 1.8% in 2015 to 0.7% in 2023. As the region's largest economy, Indonesia's 2023 ODF to GDP ratio is the sixth-highest. Of Indonesia's total ODF, 72% is delivered through non-concessional loans.

Looking ahead, new commitments to Indonesia grew by 76% in 2023 from 2022, rebounding above the pre-Covid (2015–19) average.

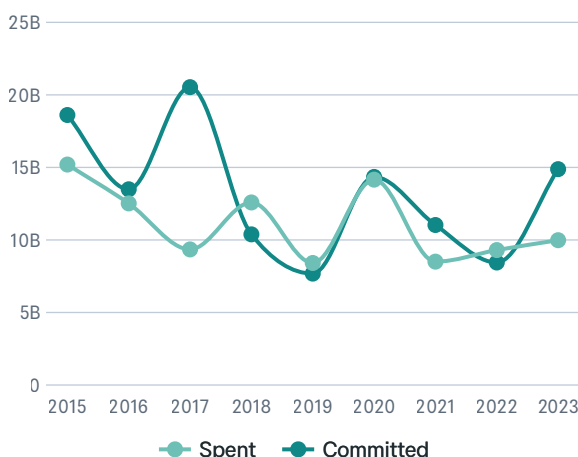
Development partners

China, the World Bank, and the Asian Development Bank (ADB) have been Indonesia's primary development partners, together accounting for almost 60% of Indonesia's ODF since 2015.

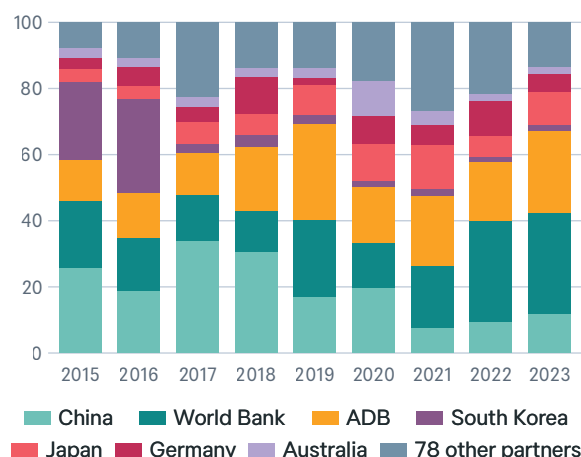
Lower levels of Chinese spending in Indonesia in 2021 and 2022 have been partially corrected with a slight uptick in 2023, driven almost entirely by the completion of the Jakarta–Bandung High-Speed Rail project. Despite that major disbursement, 2023 volumes were still only half of China's average yearly spend from 2015–22. While in the past China has been responsible for up to a third of Indonesia's ODF, since 2021 that proportion has stabilised at around 10%. Due to the scale of two infrastructure megaprojects, more than two-thirds of China's spending in Indonesia has been concentrated in the transport and storage and energy sectors. China's ODF to Indonesia is exclusively offered through non-concessional loans.

Since 2021, the World Bank has pulled ahead as Indonesia's largest development partner, accounting for an average of 27% of Indonesia's total ODF for the last three years. Major pandemic recovery programs in the health sector have contributed to much of this growth, though the bulk of the World Bank's ODF to Indonesia since 2015 has been spent in the government and civil society sector.

Official development finance to Indonesia, by transaction type
Constant 2023 US\$



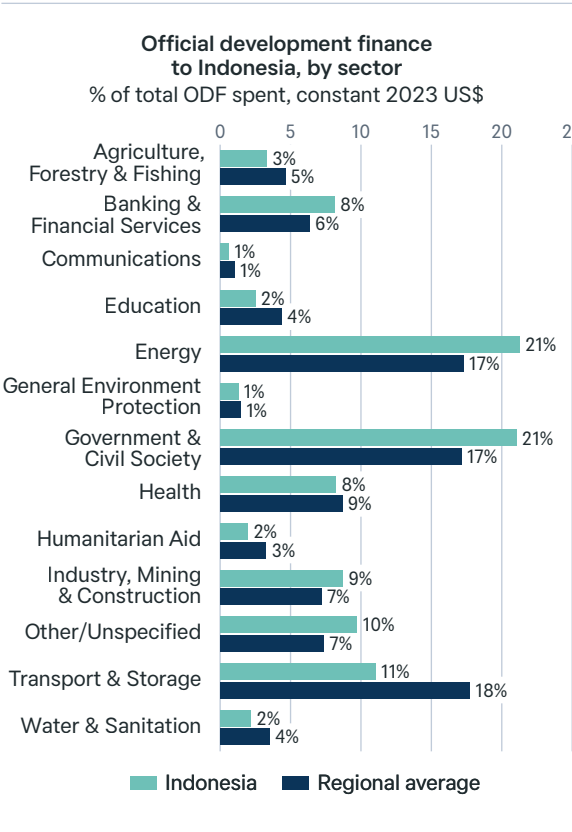
Official development finance to Indonesia, by partner
% of total ODF spent, constant 2023 US\$



The ADB has also been a key provider of ODF to Indonesia, with its contribution up 48% in 2023 from 2022. The ADB has contributed markedly steady volumes, averaging \$2 billion annually, mostly through non-concessional loans.

Once Indonesia’s second-largest development partner, South Korea’s ODF dropped dramatically to just 2% in 2023, down from 24% in 2015. This is primarily due to a scaling back of non-concessional loans and rising levels of official development assistance, a curious reversal of the trend of most partners.

The rising role of the multilateral development banks in Indonesia has been supplemented by secondary donors such as Japan, Germany, and Australia.

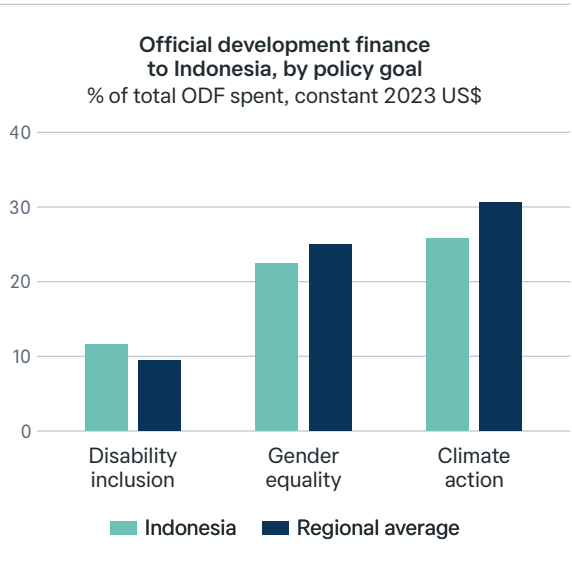


Sectors

The energy and government and civil society sectors receive the most ODF in Indonesia, each accounting for 21% of the total. That proportion does not reflect a static distribution over time, as energy spending has fallen and support for government and civil society has grown, driven by large programs from the multilateral development banks.

As a proportion of total ODF, spending in the transport and storage sector is around half the regional average.

Consistent with the region’s other upper-middle income economies, Indonesia’s ODF spending on health, education, agriculture, forestry and fishing is much lower than the regional average.



Policy goals

The Southeast Asia Aid Map tracks ODF with integrated policy goals across three policy domains or cross-cutting themes (as distinct from sectors): climate action, gender equality, and disability inclusion.

Indonesia has received rising levels of policy-integrated ODF. Over 2015–23, Indonesia received more than the regional average for ODF integrating disability inclusion (12%). However, it received slightly less than the regional average for ODF targeting gender equality (22%) and climate action (26%).

Provision of intra-regional ODF

Indonesia is the sixth-largest provider of intra-regional ODF, providing an annual average of \$235,000 over 2015–23. Indonesia’s intra-regional assistance is typically in the humanitarian aid sector, with occasional contributions in government and civil society, education, and health. Jakarta has extended around half of its ODF to Myanmar as humanitarian aid, and has also provided small amounts to Timor-Leste, Laos, and Vietnam.

LAOS

\$16.5B

SPENT

\$21.4B

COMMITTED

11,522

PROJECTS

77%

STATUS

Laos is a lower-middle income economy according to the World Bank, and a UN-designated Least Developed Country. Its 2023 GDP of \$15.8 billion accounts for 0.4% of the regional GDP of Southeast Asia. With a population of 7.7 million, Laos' GDP per capita is \$2,067, the third-lowest in the region.

From 2015 to 2023, 11,522 aid and development projects were implemented in Laos by 75 development partners, totalling \$16.5 billion in official development finance (ODF).

Key trends

ODF disbursements including grants, loans, and other forms of assistance to Laos have decreased over time. A 2018 peak in spending of over \$2.5 billion has dropped by more than half to a post-Covid (2021–23) average of \$1.2 billion annually.

ODF remains very high as a proportion of GDP in Laos, at 6% in 2023. Laos' 2023 ODF to GDP ratio is the third-highest in the region. However, progress has been made since 2015 when ODF was equivalent to more than 14% of Laos' output. Of total ODF to Laos, 50% is delivered through non-concessional loans, 30% through grants, and 20% through concessional loans.

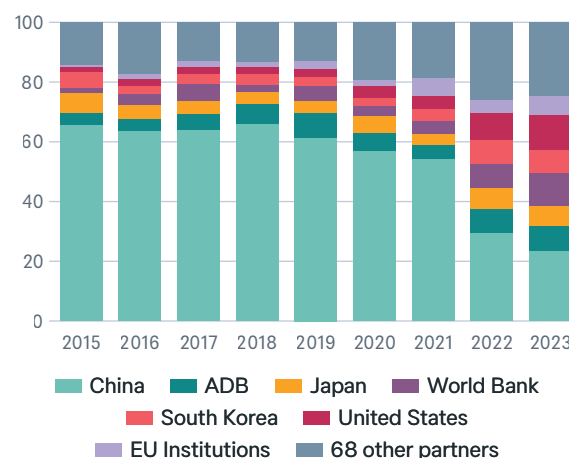
Looking ahead, new commitments to Laos have been highly variable but rebounded slightly in 2023. The 2023 level is a quarter of the peak level of commitments in 2016.

Development partners

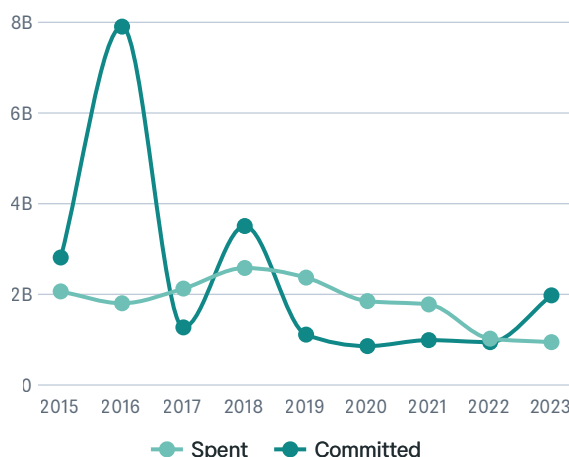
China is Laos' primary development partner, accounting for 58% of its total ODF received since 2015, though its contribution has waned. The Asian Development Bank (ADB) and Japan have provided relatively steady levels of support, while the World Bank's ODF to Laos has increased.

By year, 2023 recorded China's lowest spend in Laos since prior to 2015 at \$223 million, a dramatic drop to just 16% of the pre-Covid (2015–19) average of \$1.4 billion. China's ODF is spent overwhelmingly in the energy sector on hydropower dams, and delivered largely through non-concessional loans. The collapse in China's disbursements in Laos likely reflects acute concerns around debt sustainability.

Official development finance to Laos, by partner
% of total ODF spent, constant 2023 US\$



Official development finance to Laos, by transaction type
Constant 2023 US\$



The ADB's investments in Laos have been predominantly directed to the energy and agriculture, forestry, and fishing sectors. Concessional loans made up 48% of the total, with 37% delivered through grants, though 2023 saw the first disbursement of non-concessional finance since before the pandemic.

Japan's support to Laos is highly concessional, with 74% in the form of grants and the rest as concessional loans for infrastructure projects. Although in earlier years the infrastructure sectors of transport and storage, energy, and water and sanitation attracted the most Japanese ODF, Japan's approach has evolved to

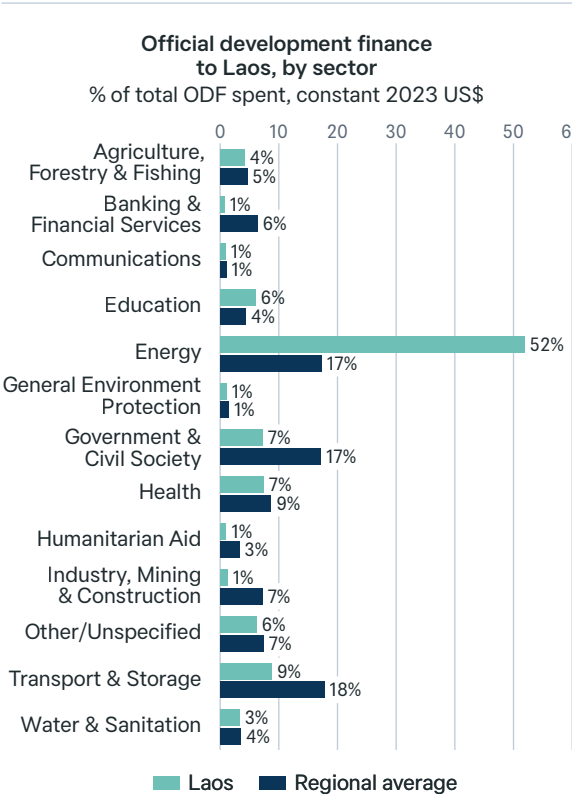
prioritise human development sectors such as government and civil society, health, and education.

The World Bank has ramped up its engagement in Laos, particularly with high growth in concessional loans in the banking and financial services, government and civil society, and education sectors. Reform to financial services, road construction, and disaster preparedness were the focus for the World Bank in Laos in 2023. The Bank’s approach to financing mechanisms has changed since 2015, from a much higher volume of grants in earlier years to exclusively non-concessional loans in 2022 and 2023.

Sectors

Laos receives less than the regional average for every sector as a proportion of ODF save for education and energy, where the spend in Laos is triple the regional average (52%).

The energy sector is dominated by several multi-billion-dollar energy generation projects, especially hydropower dams on the Mekong. At times, from 2016 to 2018, the proportion of Laos’ total annual ODF directed to the energy sector has exceeded 60%. But this dominance is receding. In 2023, the ratio was as low as 25% (still far above the regional average of 17%).



Other sectors including education, government and civil society, and health have experienced substantial growth in recent years. Of particular note is Laos’ divergence from the regional average in the transport and storage sector, which attracts the most ODF across the region but accounts for only 8% of Laos’ total ODF.

Policy goals

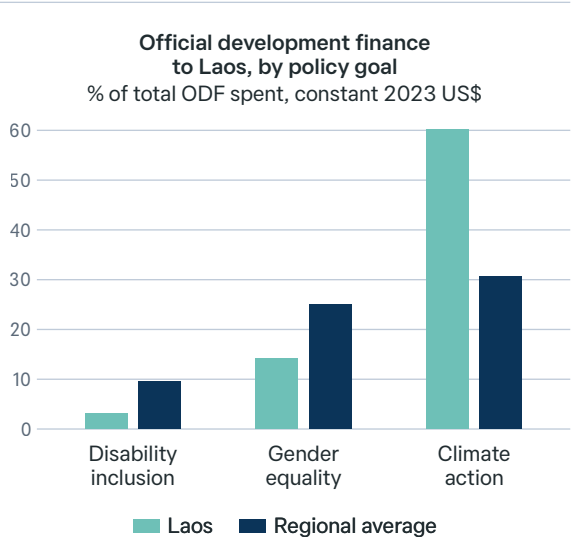
The Southeast Asia Aid Map tracks ODF with integrated policy goals across three policy domains or cross-cutting themes (as distinct from sectors): climate action, gender equality, and disability inclusion.

Over 2015–23, Laos received more than the regional average for ODF integrating climate action (60%). This figure can be partly attributed to the classification of hydropower dams as renewable energy generation projects and therefore as integrating climate action, notwithstanding criticism of the dams for environmental damage.

However, Laos received less than the regional average for ODF targeting disability inclusion (3%) and gender equality (14%).

Provision of intra-regional ODF

Laos provides an average of \$93,000 annually in intra-regional ODF, the second-lowest amount in the region. It contributes annually to regional efforts in the humanitarian aid sector, and offered support bilaterally to Indonesia in 2021. However, Laos is the largest recipient of intra-regional ODF, having received more than two-thirds of all intra-regional ODF since 2015. Its primary supporter is Thailand, which provides concessional financing mostly for small transport and storage projects, including roads and bridges.



MALAYSIA

\$11.6B

SPENT

\$20.9B

COMMITTED

5,548

PROJECTS

55%

STATUS

Malaysia is an upper-middle income economy according to the World Bank. Its 2023 GDP of \$399 billion accounts for 10.5% of the regional GDP of Southeast Asia. With a population of 35 million, Malaysia's GDP per capita is \$11,379, the third-highest in the region.

From 2015 to 2023, 5,548 aid and development projects were implemented in Malaysia by 59 development partners, totalling \$11.6 billion in official development finance (ODF).

Key trends

ODF disbursements including grants, loans, and other forms of assistance to Malaysia have grown modestly since 2015, reaching a new high in 2023 of \$1.8 billion.

ODF has fluctuated slightly relative to Malaysia's economy but remained consistently below 1% of GDP. The region's sixth-largest economy, Malaysia's ODF to GDP ratio is the fourth-lowest in the region. ODF is usually provided to Malaysia on a non-concessional basis, with non-concessional loans making up 91% of the total.

Looking ahead, new commitments to Malaysia have fallen dramatically from a peak in 2016. The drop into negative commitments in 2019 reflects the downsizing of a previous multi-billion-dollar commitment from China.

Development partners

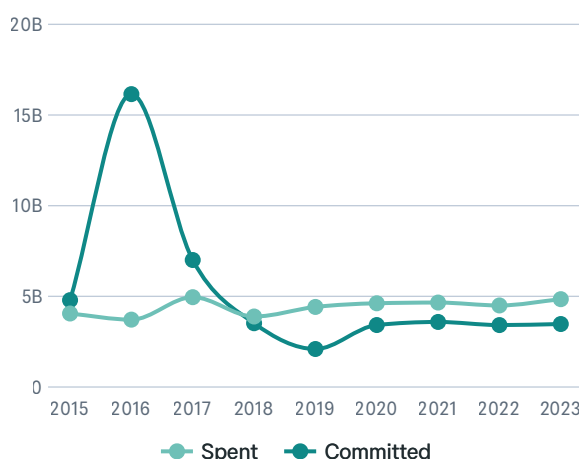
Malaysia's primary development partner is China, accounting for 82% of ODF received from 2015 to 2023. South Korea was Malaysia's top partner in 2015, but its support has since dwindled.

China's assistance, totalling \$9.5 billion from 2015–23, is underpinned by one infrastructure megaproject, which has so far attracted \$5.7 billion in disbursements. Accordingly, the transport and storage sector is the top destination for China's ODF to Malaysia. The energy and industry, mining, and construction sectors were also significant beneficiaries, although neither has attracted any disbursements since 2020. China's ODF to Malaysia is delivered largely through non-concessional loans.

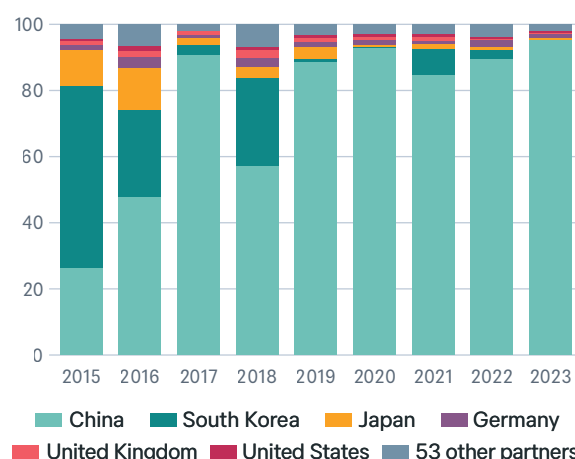
South Korea's decline from Malaysia's top development partner appears largely due to a major contraction in non-concessional loans. South Korea's ODF has been targeted to the energy and industry, mining, and construction sectors, especially in the early years of the data period. By 2023 however, its approach had changed, with the education, government and civil society, and health sectors topping the list.

Behind China and South Korea, Malaysia's second tier of partners includes Japan, Germany, the United Kingdom, and the United States.

Official development finance
to Malaysia, by transaction type
Constant 2023 US\$



Official development finance
to Malaysia, by partner
% of total ODF spent, constant 2023 US\$



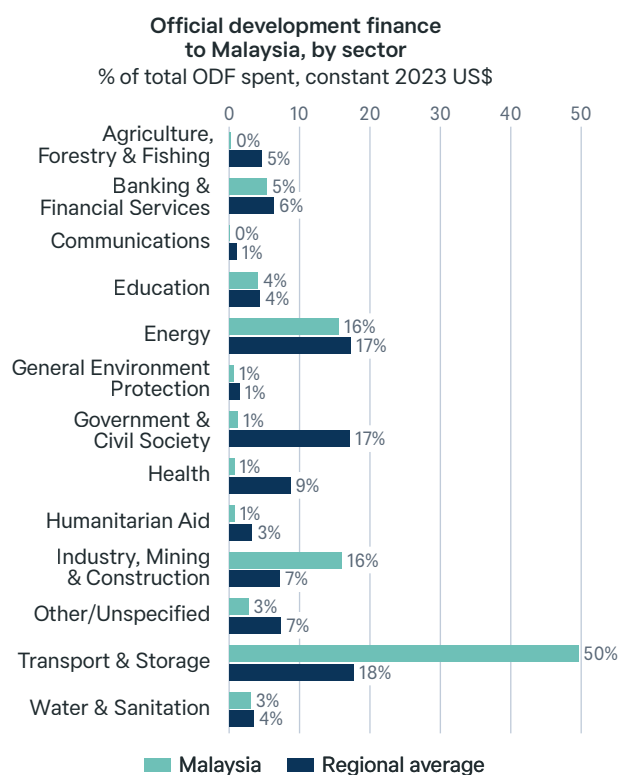
Sectors

Malaysia receives far more ODF, as a proportion of total ODF spent, in the transport and storage sector than the regional average (50% compared to 18%). It also receives more than double the regional average in the industry, mining, and construction sector.

The transport and storage sector in Malaysia is dominated by disbursements for railway projects, most notably the multi-billion-dollar East Coast Rail Link project financed through a non-concessional loan from China.

The industry, mining, and construction sector is much less significant than in earlier years of the data period, attracting just 2% in 2023 of the ODF it received in 2015. The sector has been driven by disbursements for basic metal industries, including iron and steel production.

In recent years, the growth in the education sector has been targeted to higher and tertiary education. And in the government and civil society sector, the sub-sector of labour rights has been a point of acceleration for Malaysia's ODF.

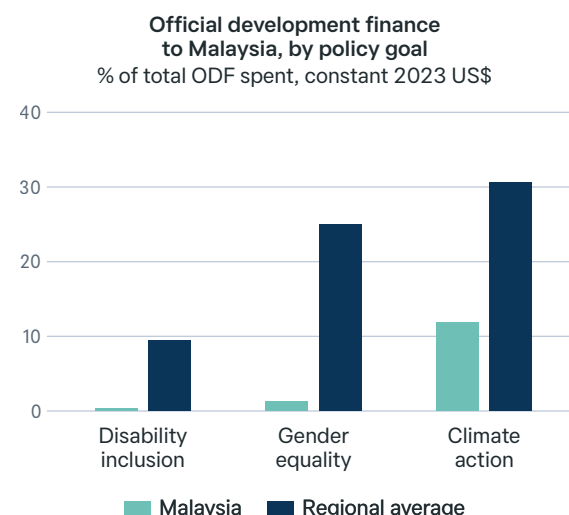


As is typical of an upper-middle income economy, Malaysia receives far below the regional average for spending on health, humanitarian aid, and agriculture, forestry, and fishing.

Policy goals

The Southeast Asia Aid Map tracks ODF with integrated policy goals across three policy domains or cross-cutting themes (as distinct from sectors): climate action, gender equality, and disability inclusion.

Over 2015–23, Malaysia received below average proportions of ODF targeting all three policy areas. Of total ODF, 0% went towards integrated disability inclusion, compared to a regional average of 9%; 1% went to integrated gender equality, compared to a regional average of 25%; and 12% went to integrated climate action, compared to a regional average of 31%.



Provision of intra-regional ODF

Malaysia is a very minor provider of intra-regional ODF relative to its income status. It provided an average of \$108,000 annually in support to its neighbours, almost entirely on a multilateral basis and exclusively for humanitarian aid. Two bilateral transactions were recorded to Laos in 2018 and 2020.

MYANMAR

\$23.4B SPENT	\$48.5B COMMITTED	18,483 PROJECTS	48% STATUS
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Myanmar is a lower-middle income economy according to the World Bank, and a UN-designated Least Developed Country. Its 2023 GDP of \$66 billion accounts for 1.8% of the regional GDP of Southeast Asia. With a population of 54 million, Myanmar's GDP per capita is \$1,233, the lowest in the region.

From 2015 to 2023, 18,483 aid and development projects were implemented in Myanmar by 77 development partners, totalling \$23.4 billion in official development finance (ODF).

Key trends

ODF disbursements including grants, loans, and other forms of assistance to Myanmar have decreased over time. A 2020 peak in spending of over \$4 billion has dropped by more than half to a post-Covid (2021–23) average of \$1.6 billion annually. Disbursements have reached unprecedented lows since the February 2021 coup when the military regime seized power and many donors ceased operations.

ODF has fluctuated relative to Myanmar's economy, growing from 4.4% in 2015 to 5.4% in 2020 and dropping back to 2.2% in 2023. Myanmar's 2023 ODF to GDP ratio is the fourth-highest in the region. Grants make up the lion's share of Myanmar's ODF at 57%, while 27% is delivered as concessional loans and 16% as non-concessional loans.

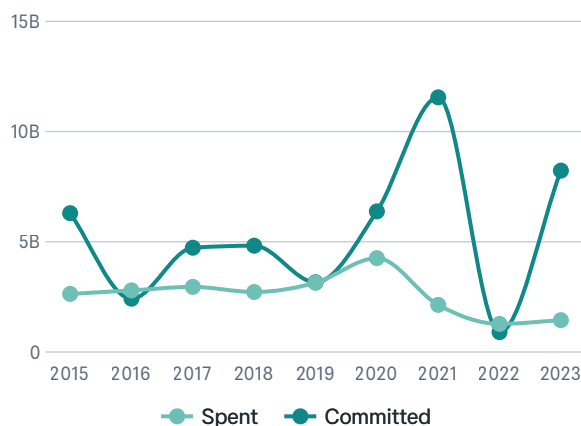
Looking ahead, new commitments to Myanmar have been highly variable but rebounded in 2023 to the second-highest level since 2015.

Development partners

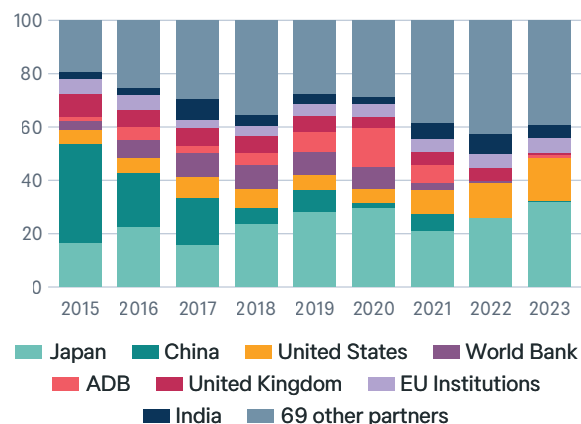
Japan is Myanmar's primary development partner, accounting for almost one-quarter of its total ODF received since 2015 and higher in recent years. China, the United States, the World Bank, and the Asian Development Bank (ADB) together comprise just under an additional third of Myanmar's ODF over the data period.

Japan's contribution has averaged around \$620 million annually, with a major surge in 2020 for pandemic support. But in 2021, it dropped by almost two-thirds, and since the coup has hovered around \$415 million per year. Japan continues to disburse funds for infrastructure projects in Myanmar in the transport and storage and energy sectors, despite the access challenges that

Official development finance to Myanmar, by transaction type
Constant 2023 US\$



Official development finance to Myanmar, by partner
% of total ODF spent, constant 2023 US\$

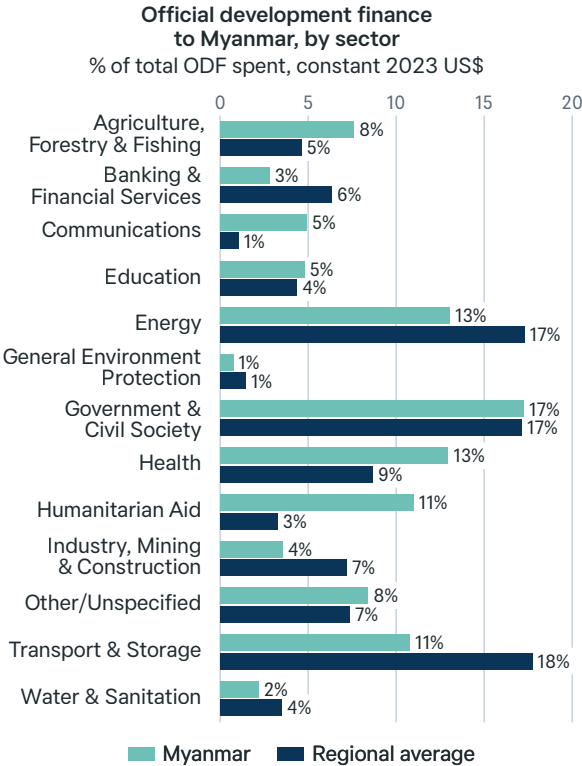


have prevented other partners. Japan's support is provided entirely through official development assistance, increasingly via concessional loans rather than grants.

By contrast, most of China's support, averaging \$340 million per year, is delivered through non-concessional loans. China's activities in Myanmar are difficult to assess because of a lack of transparency, meaning the Southeast Asia Aid Map may underestimate China's engagement. Our data show China has continued to commit to large infrastructure projects but has struggled to implement due to logistical challenges in conflict zones, resulting in an implementation rate of just 13% since 2015. In 2023, China spent 0.3% of its 2015 spend, confined exclusively to the humanitarian aid sector.

The United States has a much higher implementation rate in Myanmar (85%), likely because of its low commitments in the infrastructure sector. The United States favours the humanitarian aid, government and civil society, and health sectors. Prior to 2021, 94% of this support was provided through grants, but the ratio increased to 100% after the coup when the United States ceased lending to the government. In 2023, the United States disbursed its highest spend in Myanmar since before 2015.

The multilateral development banks, the ADB, and the World Bank have played a major role in Myanmar’s ODF landscape to date, together responsible for 12% of disbursements from 2015–23. However, their contributions have diminished recently. The World Bank recorded zero disbursements in Myanmar in 2023, and the ADB’s 2023 spend, mostly in the health sector, was equivalent to just 6% of its 2019 disbursement.



Sectors

The government and civil society sector receives the most ODF in Myanmar, with a proportion of total ODF received slightly higher than the regional average. After general budget support operations, the most popular sub-sectors are assistance for civilian peace-building activities and support for democratic participation and civil society.

Myanmar stands out for the high proportion of ODF directed to humanitarian aid, health, communications, and agriculture, forestry, and fishing. Focus on those sectors is typical of the region’s lowest-income economies. The amount spent on humanitarian aid in Myanmar is almost four times the regional average, indicating partners’ reactivity to the ongoing violence.

Myanmar receives lower proportions of ODF in the water and sanitation, transport and storage, energy, and banking and financial services sectors. The low level of disbursement in the transport and storage sector belies a very high volume of commitments, with \$20 billion yet to be disbursed.

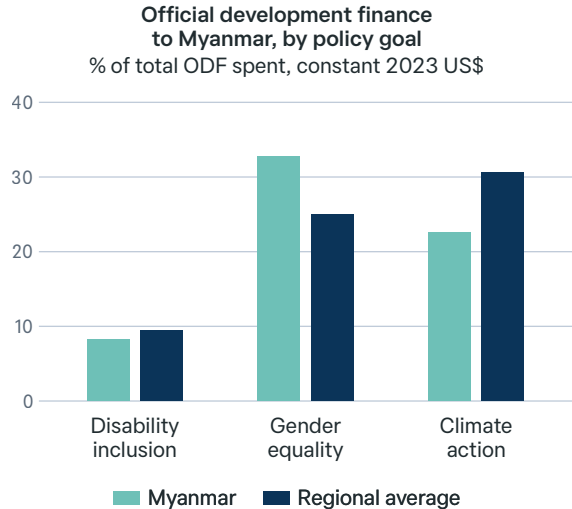
Policy goals

The Southeast Asia Aid Map tracks ODF with integrated policy goals across three policy domains or cross-cutting themes (as distinct from sectors): climate action, gender equality, and disability inclusion.

Over 2015–23, Myanmar received more than the regional average for ODF integrating gender equality (33%). However, it received slightly less than the regional average for ODF targeting disability inclusion (8%) and climate action (23%).

Provision of intra-regional ODF

Myanmar provides the lowest volume of intra-regional ODF in Southeast Asia, averaging \$84,000 annually. Since 2015, it has provided intra-regional ODF only on a multilateral basis to regional programs rather than bilaterally. Myanmar is the second-largest recipient of support from its neighbours, behind only Laos. Thailand is the largest provider of intra-regional aid to Myanmar, exclusively through grants.



PHILIPPINES

\$49B

SPENT

\$99B

COMMITTED

17,587

PROJECTS

49%

STATUS

The Philippines is a lower-middle income economy according to the World Bank. Its 2023 GDP of \$437 billion accounts for 11.5% of the regional GDP of Southeast Asia. With a population of 115 million, the Philippines' GDP per capita is \$3,805, the seventh-highest in the region.

From 2015 to 2023, 17,587 aid and development projects were implemented in the Philippines by 77 development partners, totalling close to \$50 billion in official development finance (ODF).

Key trends

ODF disbursements including grants, loans, and other forms of assistance to the Philippines have grown over time. Disbursements remained below \$5 billion annually until 2020, when a peak of \$10.7 billion was hit. Levels have since moderated to a relatively stable post-pandemic annual average (2021–23) of \$6.5 billion.

ODF has decreased relative to the Philippines' economy, doubling from 1.5% in 2015 to 3% in 2020 and settling in 2023 at 1.64% of GDP. Of the Philippines' total ODF, 64% is delivered through non-concessional loans, with the remainder split between concessional loans (20%) and grants (16%).

Looking ahead, new commitments to the Philippines have been extremely volatile, with peaks in 2016 and

2020 followed by dramatic drops. In 2023, commitments rebounded to the third-highest level since 2015.

Development partners

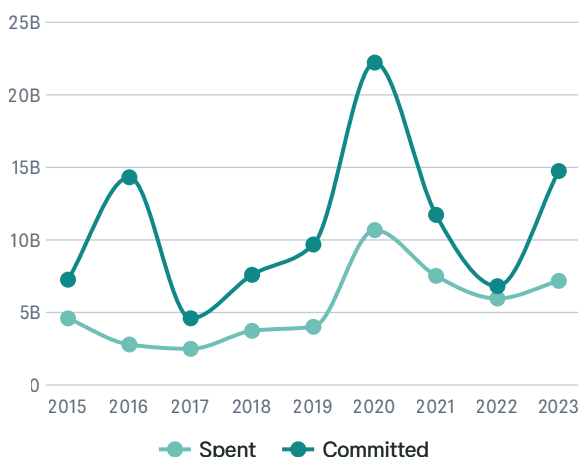
The Asian Development Bank (ADB) is the Philippines' primary development partner, accounting for more than one-third of its ODF since 2015. The World Bank accounts for 25% and Japan for 18%.

In 2020, the ADB rapidly ramped up its operations in the Philippines in response to the pandemic, with aid jumping from \$1.1 billion in 2019 to \$5.2 billion in 2020 (48% of the Philippines' total ODF in that year). Since then, levels have remained elevated above \$2 billion annually. The ADB concentrates its spending in the government and civil society, banking and financial services, and health sectors. Most of its assistance to the Philippines is delivered through non-concessional loans with minimal grants.

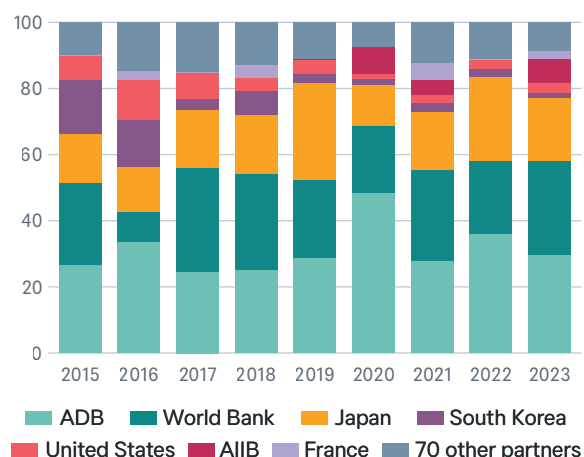
The World Bank similarly responded with force in 2020, more than doubling its annual spend in the Philippines. Like the ADB, the World Bank's top sector in the Philippines by spending is government and civil society. It employs exclusively non-concessional loans.

Japan's assistance to the Philippines has been building steadily, with a post-pandemic average annual disbursement of \$1 billion (2021–23). Japan focuses on the transport and storage sector, with a particular

Official development finance
to the Philippines, by transaction type
Constant 2023 US\$



Official development finance
to the Philippines, by partner
% of total ODF spent, constant 2023 US\$



recent focus on railways, and delivers ODF through a mix of grants (13%) and concessional loans (87%).

In 2015, South Korea was the Philippines’ third-largest development partner, but its support has fallen away in recent years, largely due to withdrawal of its non-concessional loan offerings in infrastructure sectors to provide exclusively concessional finance and grants.

Sectors

The top sector in the Philippines by spending is government and civil society, which accounts for 27% of the Philippines’ total ODF over 2015–23, well above the regional average of 17%. The Philippines also exceeds its peers in terms of ODF spending in humanitarian aid, health, general environment protection, education, communications, banking and financial services, and agriculture, forestry, and fishing.

Government and civil society sector spending is directed towards social protection, public sector policy, and public finance management. The sector was the top ODF destination from 2015 to 2017 and again in 2019, briefly eclipsed by humanitarian aid in 2018 and then falling behind health during the pandemic from 2021 onwards.

In 2022 and 2023, spending in transport and storage was exceptionally strong. Disbursements in this sector had previously been far below regional averages, in part due to a lack of fulfilment of commitments for major railway projects. The Philippines is making up for lost time in transport and storage, receiving more than \$3 billion in ODF for railway construction in 2022 and 2023.

ODF spending on energy in the Philippines is just a fraction of the regional average, at 1% compared to 17%. A majority of investment in the energy sector is directed to renewable energy generation and transmission and distribution.

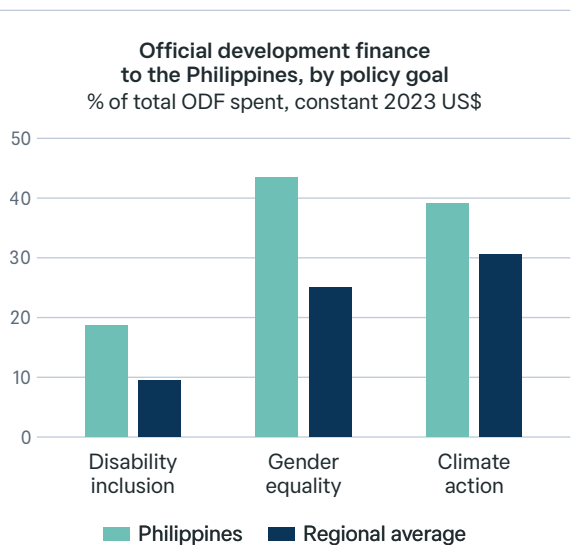
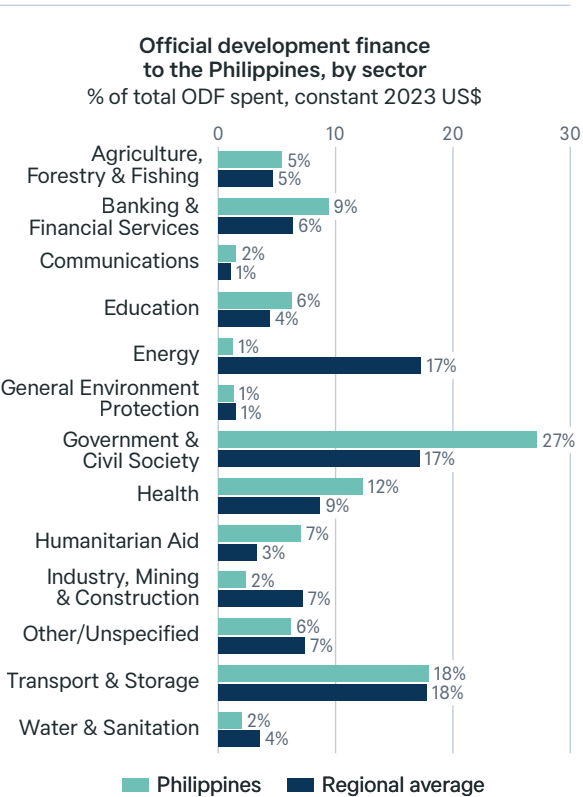
Policy goals

The Southeast Asia Aid Map tracks ODF with integrated policy goals across three policy domains or cross-cutting themes (as distinct from sectors): climate action, gender equality, and disability inclusion.

Over 2015–23, the Philippines received considerably higher policy goal-integrated ODF as a proportion of total ODF across all three policy domains: 43% compared with 25% for gender equality, 19% compared with 9% for disability inclusion, and 39% compared with 31% for climate action.

Provision of intra-regional ODF

The Philippines is a very minor provider of development assistance to its neighbours, accounting for just 0.3% of total intra-regional ODF from 2015 to 2023. Manila contributes mostly on a regional level in the humanitarian aid sector, with only one bilateral transaction recorded to Indonesia in 2018. The Philippines receives very limited intra-regional ODF, mostly consisting of minor grants from Thailand.



SINGAPORE

\$7.2M

SPENT

\$5.4M

COMMITTED

46

PROJECTS

100%

STATUS

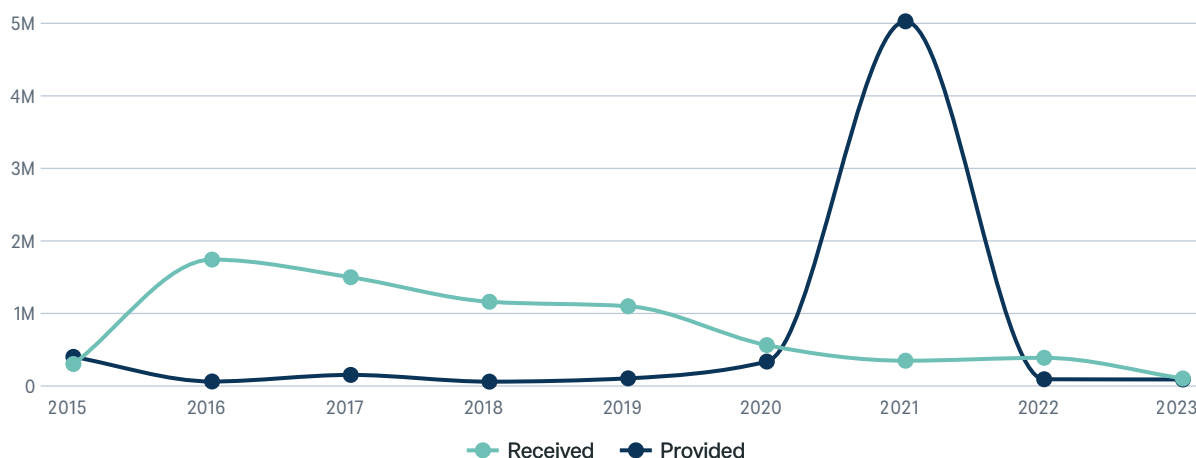
Singapore is one of two high-income economies in Southeast Asia, alongside Brunei. Its 2023 GDP of \$501 billion accounts for 13% of the regional GDP of Southeast Asia. With a population of 5.9 million, Singapore's per capita GDP of \$84,734 is the highest in Southeast Asia.

Despite Singapore's high-income status, its outgoing official development finance (ODF) program is modest. From 2015 to 2023, Singapore spent only \$6.3 million in development finance in Southeast Asia.

Singapore also receives a small amount of development finance, totalling \$7.2 million from 2015 to 2023. Japan and the United States were Singapore's major source of ODF, responsible for over 88% of those disbursements. Other donors include the United Kingdom and the European Union.

The total ODF Singapore received was almost equivalent to what the country disbursed over 2015–23. However, if vaccine donations are not included, Singapore received more than five times as much as it

Official development finance
provided by and received by Singapore
Constant 2023 US\$



Singapore's development finance program is narrow, entirely focused on health and humanitarian aid. It contributes regularly to ASEAN's Coordinating Centre for Humanitarian Assistance on Disaster Management and has disbursed funds for disaster relief and recovery on several occasions, usually implemented by the Singapore Red Cross or Ministry of Health. Singapore has on occasion provided funds directly to Indonesia, Laos, and Myanmar, but more commonly supports regional efforts.

disbursed, at odds with its position as the wealthiest nation in the region. Levels of ODF that integrated climate action, disability inclusion, and gender equality from and to Singapore were negligible.

THAILAND

\$13.5B	\$35.7B	9,941	38%
SPENT	COMMITTED	PROJECTS	STATUS

Thailand is an upper-middle income economy according to the World Bank. Its 2023 GDP of \$514 billion accounts for 13.6% of the regional GDP of Southeast Asia. With a population of 72 million, Thailand’s GDP per capita is \$7,182, the fourth-highest in the region.

From 2015 to 2023, 9,941 aid and development projects were implemented in Thailand by 66 development partners, totalling \$13.5 billion in official development finance (ODF).

Key trends

ODF disbursements including grants, loans, and other forms of assistance to Thailand have experienced volatility from 2015 to 2023. After rising rapidly in 2016 and 2017, levels dropped again until a boom in 2021 as partners responded to the pandemic. However, 2023 ODF levels to Thailand were lower than in 2015.

ODF has fluctuated relative to Thailand’s economy but remains below 1% of GDP. The region’s second-largest economy, Thailand’s ODF to GDP ratio is the third-lowest in the region. ODF is most often provided to Thailand through loans, with 47% non-concessional loans, 36% concessional loans, and the rest delivered as grants.

Looking ahead, new commitments to Thailand have dropped dramatically from peaks in 2015 and 2019.

Development partners

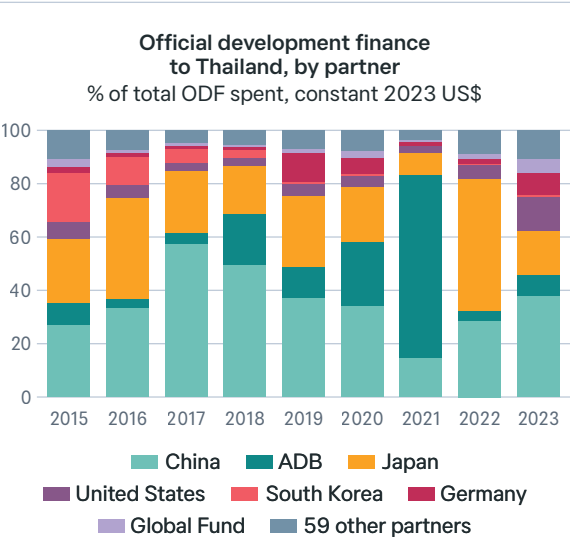
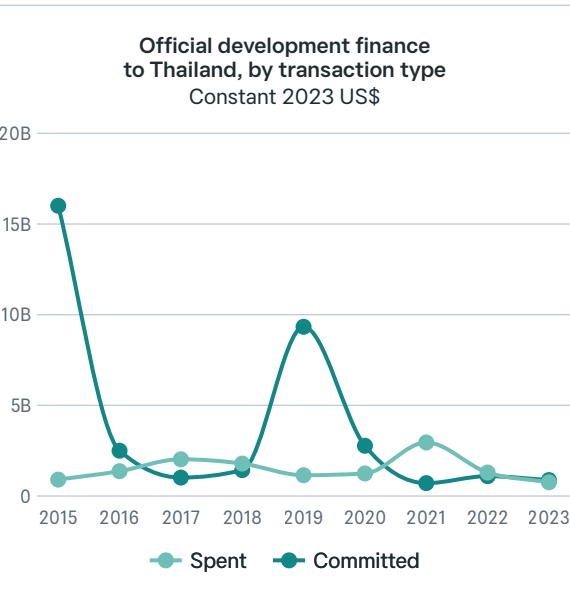
Thailand’s primary development partners are China, responsible for more than one-third of Thailand’s ODF received from 2015 to 2023, the Asian Development Bank (ADB), and Japan. While their relative weighting has shifted over time, those three partners have accounted for more than 80% of Thailand’s ODF.

China’s support to Thailand peaked in 2017, coinciding with the height of the Belt and Road Initiative. The major sector of investment for China’s ODF is transport and storage, through a multi-billion-dollar loan for high-speed rail. There is a relatively even split in China’s ODF between concessional and non-concessional loans, with very limited use of grants.

The ADB’s contribution to Thailand was relatively modest leading up to the pandemic, but an extraordinary expansion of its activities saw it contribute

more than \$2 billion in 2021, 69% of Thailand’s total ODF for that year. Of that amount, \$1.4 billion was directed to the government and civil society sector for budget support programs. The ADB has also supported Thailand’s energy transition through several wind, solar, and battery projects. The ADB’s ODF to Thailand is delivered primarily through non-concessional loans.

Japan’s contribution has remained largely stable, notwithstanding a strong increase in 2022 that was not sustained into 2023. The 2022 boost was driven by



large disbursements in the government and civil society sector. However, the major sector for Japan's ODF in Thailand is transport and storage, specifically for transport systems in Bangkok. Japan largely utilises concessional loans and occasional grants.

The United States, South Korea, and Germany make up Thailand's second tier of development partners, collectively contributing around 11% of ODF from 2015 to 2023. While South Korea's support has waned over time, Germany's has strengthened. The United States has maintained steady assistance over time, reaching a new high in 2023.

Sectors

Thailand receives far more ODF, as a proportion of total ODF received, in the transport and storage and government and civil society sectors than the regional average. Like other upper-middle income economies, Thailand receives less than the regional average in the water and sanitation, health, education, and agriculture, forestry, and fishing sectors.

The high concentration of ODF in the transport and storage sector (36% of all ODF received by Thailand) is attributable to a major high-speed rail project, with rail transport accounting for 89% of ODF received in that sector.

In the government and civil society sector, there is a strong emphasis on public finance management, trade facilitation, and social protection services. This sector experienced weaker disbursements in 2023 after very strong growth in 2021.

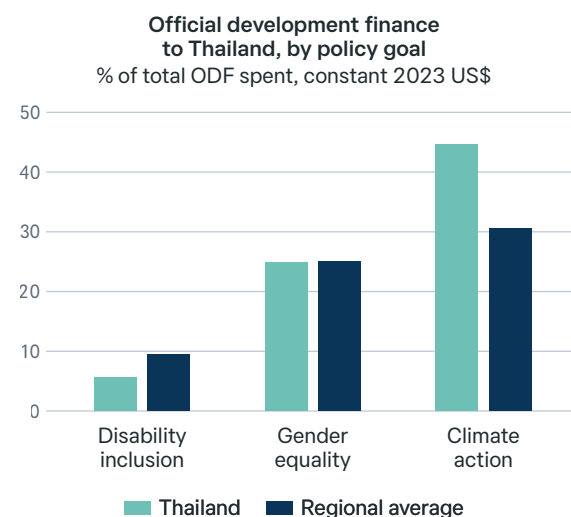
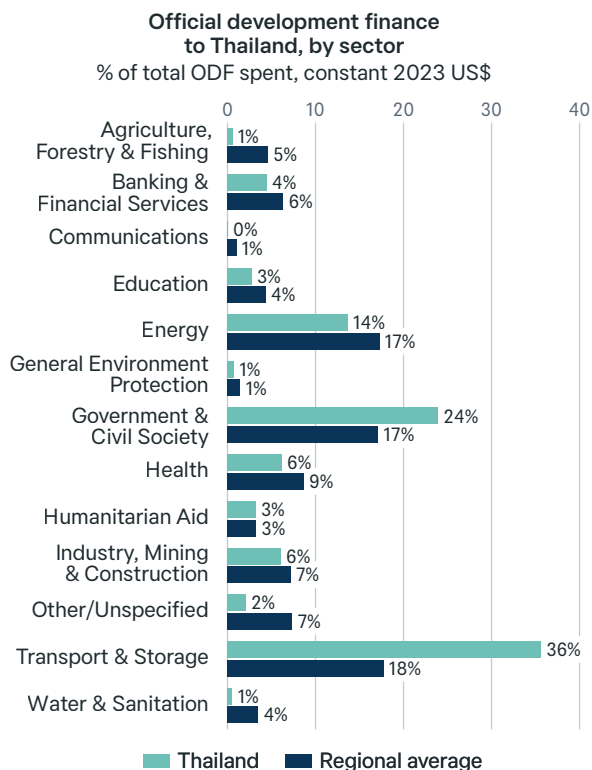
Policy goals

The Southeast Asia Aid Map tracks ODF with integrated policy goals across three policy domains or cross-cutting themes (as distinct from sectors): climate action, gender equality, and disability inclusion.

Over 2015–23, Thailand received more than the regional average for ODF integrating climate action (45%). The proportion of funding targeting gender equality was equivalent to the regional average at 25%, while funding with a focus on disability inclusion was lower than the regional average at 6%.

Provision of intra-regional ODF

Thailand is the region's largest provider of intra-regional ODF, disbursing an average of \$70 million annually from 2015 to 2022. The major beneficiaries of Thailand's development program are Laos, Myanmar, and Cambodia, though it has also disbursed assistance



to Vietnam, Indonesia, the Philippines, Timor-Leste, and Malaysia. Thailand uses a mix of concessional loans and grants, and is active in a range of sectors, especially transport and storage.

The Aid Map was unable to confirm Thailand's provision of bilateral intra-regional ODF in 2023, with incomplete data recorded despite Thailand's commendable history of voluntarily reporting its activities to the Organisation for Economic Cooperation and Development in previous years.

TIMOR-LESTE

\$2.8B	\$3.4B	6,250	81%
SPENT	COMMITTED	PROJECTS	STATUS

Timor-Leste is a lower-middle income economy, a UN-designated Least Developed Country, and the smallest economy in Southeast Asia. Its 2023 GDP of \$2.1 billion accounts for 0.1% of the regional GDP of Southeast Asia. With a population of 1.4 million, Timor-Leste’s GDP per capita is \$1,503, the second-lowest in the region.

From 2015 to 2023, 6,250 aid and development projects were implemented in Timor-Leste by 53 development partners, totalling \$2.8 billion in official development finance (ODF).

Key trends

ODF disbursements including grants, loans, and other forms of assistance to Timor-Leste have remained remarkably steady over time, averaging just over \$300 million annually.

In absolute terms, Timor-Leste receives the least ODF in developing Southeast Asia. However, Timor-Leste receives the highest amount of ODF relative to the size of its economy, with ODF equivalent to 14% of GDP in 2023. Reflecting its low income level, 87% of ODF received by Timor-Leste is in the form of grants.

Looking ahead, new commitments to Timor-Leste have halved over the last two years since a peak in 2021, now below the annual average for 2015–23. This trend could indicate a forthcoming decline in disbursement levels.

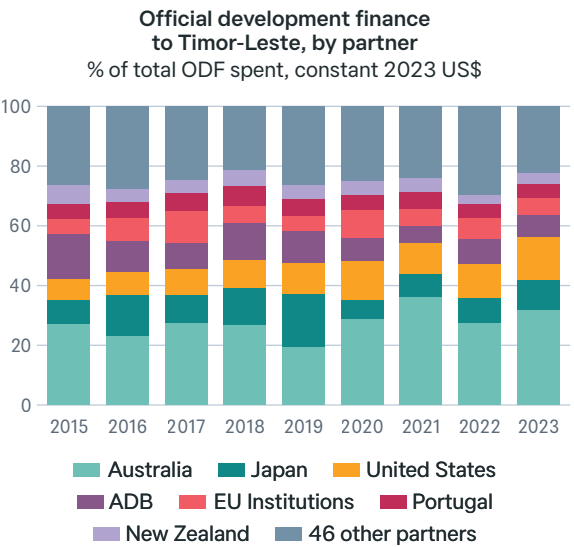
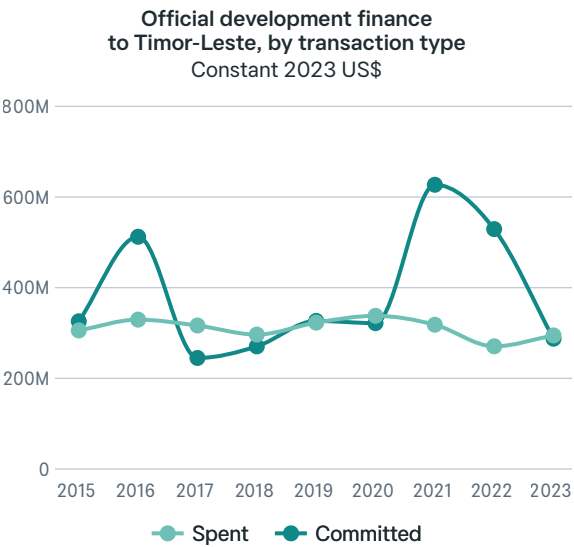
Development partners

Australia was responsible for more than one-quarter of ODF to Timor-Leste from 2015–23, and at times has accounted for one-third of incoming ODF (in 2021 and 2023).

Australia’s support is directed primarily, and increasingly, to the government and civil society sector, largely for human development, sub-national governance, and fiscal budget support programs. Australia provides its ODF to Timor-Leste entirely through grants.

Japan, the United States, and the Asian Development Bank (ADB) made up Timor-Leste’s second tier of partners, each contributing around 10% of total incoming ODF over 2015–23. While Japan’s support has remained relatively steady and the United States’ has grown, the ADB is playing a diminishing role in Timor-Leste, its support having halved in real terms since 2015.

Japan and the ADB share a focus on infrastructure, with both spending the most in the transport and storage sector, while the United States targets its support to human development, focusing on government and civil society, education, humanitarian aid, and health. The United States delivers its ODF exclusively through grants, while the ADB deploys a mixture of financing mechanisms including grants, concessional loans, and non-concessional loans. In 2023, for the first



time ever, Japan did not provide concessional loans to Timor-Leste, using only grants.

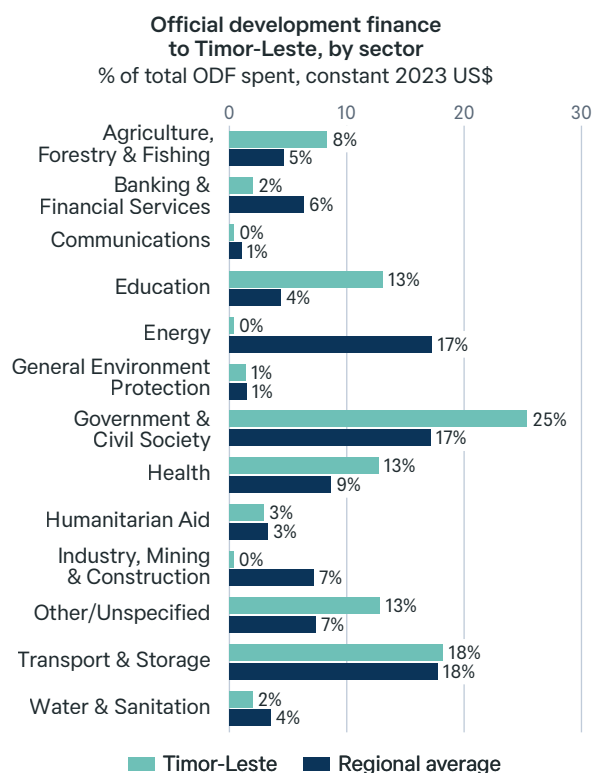
Former colonial power Portugal's ODF to Timor-Leste has remained consistent, in particular funding education programs through grants.

Sectors

Timor-Leste receives the most ODF in the government and civil society sector, accounting for 25% over 2015–23, mostly for public sector institution capacity-building and employment policy development.

The second-largest ODF sector in Timor-Leste is transport and storage, dominated by construction of roads and water transport infrastructure such as ports. In recent years, the focus on transport and storage has declined; where it was in some years (2016, 2018, and 2019) the largest sector, in 2023 it was ranked fifth by spending.

The education and health sectors have received steady levels of assistance, including a substantial bump in 2021 in response to the pandemic. Early childhood education and the provision of meals and snacks at school account for the majority of spending under education, while basic nutrition is the biggest sub-sector by spending under health, reflecting high levels of

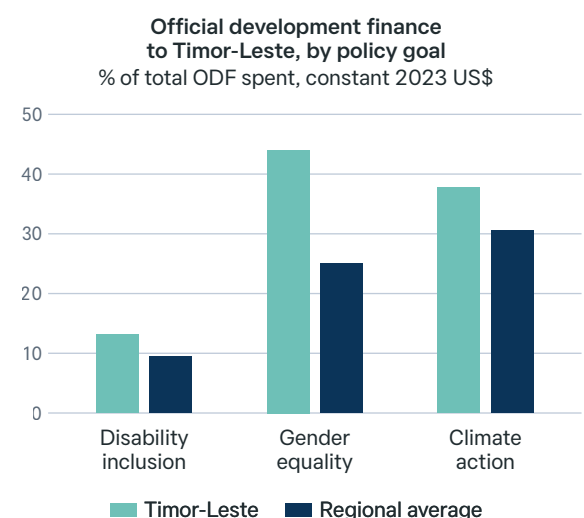


stunting and malnutrition in the country. Combined, those two sectors constitute 26% of Timor-Leste's annual average ODF.

Policy goals

The Southeast Asia Aid Map tracks ODF with integrated policy goals across three policy domains or cross-cutting themes (as distinct from sectors): climate action, gender equality, and disability inclusion.

Timor-Leste has received rising levels of policy-integrated ODF, and in fact receives more than the regional average for all three policy domains as a share of ODF. Over 2015–23, 13% of Timor-Leste's ODF was marked for disability inclusion, 44% for gender equality, and 38% for climate action.



Provision of intra-regional ODF

Timor-Leste is a small and irregular provider of assistance to its neighbours, in part because it is not yet a formal member of the Association of Southeast Asian Nations. It has provided modest amounts of humanitarian aid to Thailand, Malaysia, Indonesia, Laos, and Myanmar, but has not disbursed any intra-regional ODF since 2019.

VIETNAM

\$49.6B SPENT	\$52.3B COMMITTED	22,538 PROJECTS	95% STATUS
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Vietnam is a lower-middle income economy according to the World Bank. Its 2023 GDP of \$430 billion accounts for 11.3% of the regional GDP of Southeast Asia. With a population of 100 million, Vietnam’s GDP per capita is \$4,282, the sixth-highest in the region.

From 2015 to 2023, 22,538 aid and development projects were implemented in Vietnam by 80 development partners, totalling \$49.6 billion in official development finance (ODF).

Key trends

ODF disbursements including grants, loans, and other forms of assistance to Vietnam have decreased over time. A 2015 peak in spending of over \$9.3 billion has dropped by more than two-thirds to a 2023 low of \$2.9 billion.

ODF has decreased relative to Vietnam’s economy, down to 0.7% in 2023 from 3.9% in 2015. Vietnam’s 2023 ODF to GDP ratio is the fourth-lowest in the region. ODF to Vietnam is most commonly delivered through concessional loans, accounting for 46% of total ODF received, while 38% is delivered as non-concessional loans and the remainder as grants.

Looking ahead, new commitments to Vietnam have been steadily decreasing, but 2023 saw a minor uptick from a record low in 2022.

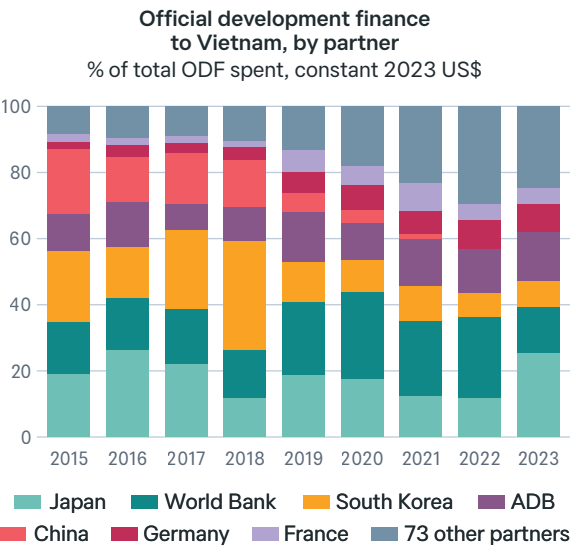
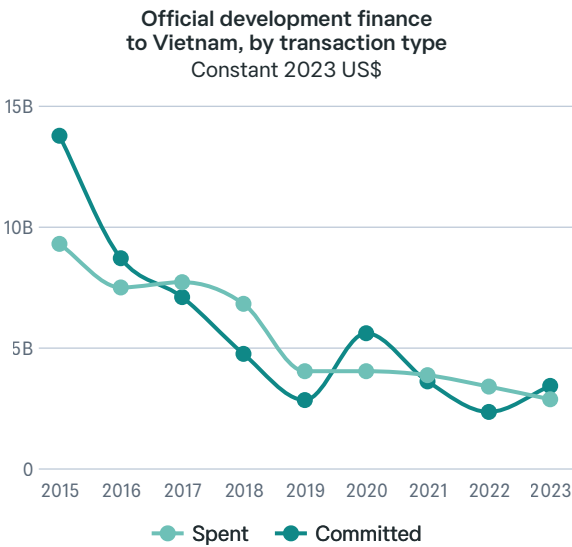
Development partners

Japan is Vietnam’s primary development partner, accounting for almost one-fifth of its total ODF received since 2015. The World Bank and South Korea comprise Vietnam’s second tier of partners, followed by the Asian Development Bank (ADB) and China.

Japan’s assistance is delivered largely through concessional loans (90% of its total ODF to Vietnam) and has decreased over time from a 2016 peak of close to \$2 billion to a post-Covid (2021–23) annual average of \$540 million. In earlier years, the transport and storage sector attracted the most financing from Japan, especially for urban railway projects. More recently, Japan’s attention has turned to the government and civil society sector. In 2023, this was bolstered by a large disbursement for a budget support program.

The World Bank’s support to Vietnam has also diminished, from almost \$1.5 billion in 2015 to \$400 million in 2023. The World Bank has devoted considerable assistance to the infrastructure sectors of transport and storage, water and sanitation, and energy, often through concessional loans (79% of its total ODF to Vietnam).

South Korea’s ODF to Vietnam has experienced extreme volatility, dropping by 79% in one year (2019) and decreasing further since then, primarily due to a dramatic reduction in non-concessional loans. South



Korea's support is targeted to the industry, mining, and construction and energy sectors.

The ADB's assistance is focused on energy as well as transport and storage, especially highway connectivity projects. More recently, the health sector has also attracted ADB support. The composition of the ADB's ODF to Vietnam has evolved over time, from a relatively even split between concessional and non-concessional loans in 2015 to higher levels of non-concessional loans in 2021 and 2022, but this trend reversed in 2023.

Sectors

The top sector in Vietnam by spending is energy, which accounts for close to a quarter of Vietnam's total ODF over 2015–23, well above the regional average of 17%. Vietnam also exceeds its peers in terms of ODF spending in water and sanitation, transport and storage, industry, mining, and construction, general environment protection, and education.

Worryingly, the most prominent sub-sector in Vietnam's energy sector is coal-fired electric power plants, still attracting disbursements in 2023. The next most prominent sub-sectors by spending are power transmission and unspecified non-renewable energy generation, underscoring the challenge Vietnam faces in decarbonising its economy. However, in 2023, renewable energy generation was second only to power transmission, and wind energy also attracted high levels of ODF.

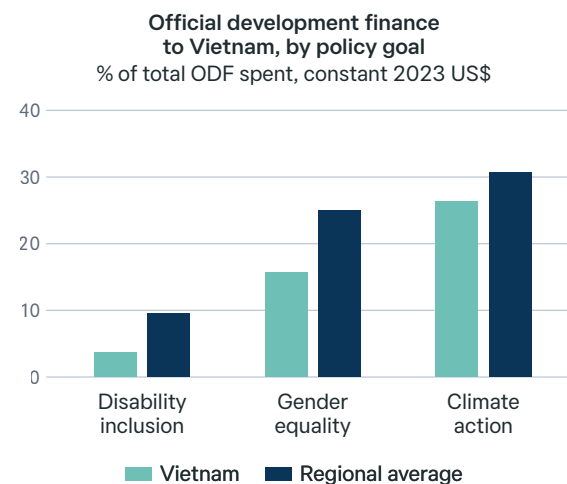
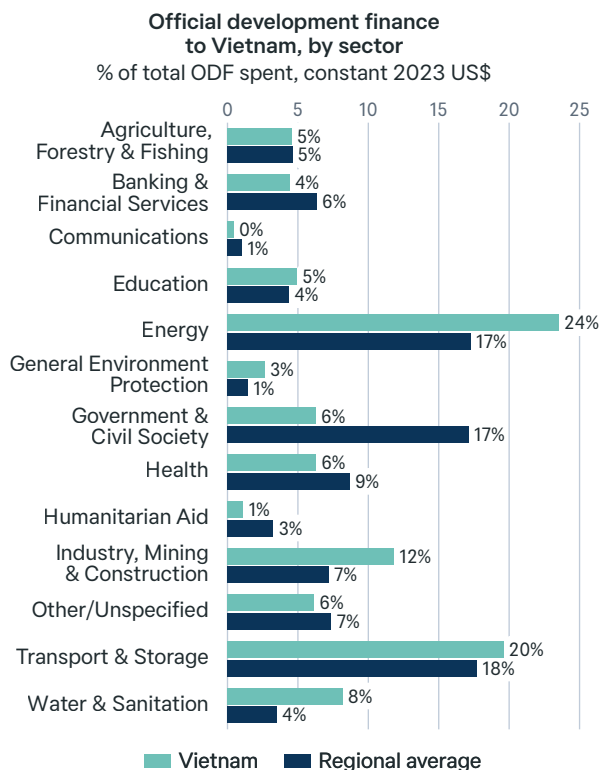
Vietnam's second-largest ODF sector is transport and storage, dominated by road and rail transport and marginally higher than the regional average (20% compared with 18%).

Vietnam's ODF spending is far below the regional average for government and civil society (6% compared with 17%) and health (6% compared with 9%).

Policy goals

The Southeast Asia Aid Map tracks ODF with integrated policy goals across three policy domains or cross-cutting themes (as distinct from sectors): climate action, gender equality, and disability inclusion.

Over 2015–23, Vietnam received less than the regional average for ODF targeting climate action (26%), disability inclusion (4%), and gender equality (16%). Despite Vietnam's position as the second-highest recipient over 2015–23, the volume of ODF clearly does not necessarily equate with high levels of policy goal incorporation.



Provision of intra-regional ODF

Vietnam has provided an annual average of \$17 million in intra-regional ODF since 2015. Its support has mostly been extended to its neighbour Laos, with other disbursements to Cambodia, Indonesia, and the Philippines as well as contributions to regional efforts. Vietnam's intra-regional ODF most often focuses on the industry, mining, and construction and energy sectors.

Vietnam is the fourth-largest recipient of intra-regional ODF, mostly from Thailand.

REGIONAL INITIATIVES

\$2.2B SPENT	\$3.4B COMMITTED	2,477 PROJECTS	65% STATUS
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The Regional Initiatives recipient category captures both funding allocated to regional organisations, such as the Association of Southeast Asian Nations, and projects implemented across multiple countries.

From 2015 to 2023, 2,477 projects were implemented in the Regional Initiatives category by 53 development partners, totalling \$2.2 billion in official development finance (ODF). This represents less than 1% of all ODF recorded in the Southeast Asia Aid Map.

Key trends

ODF disbursements including grants, loans, and other forms of assistance to Regional Initiatives have increased over time — steadily from 2015 to 2022 and then growing sharply in 2023. ODF in this category is most often delivered as grants (89%), with occasional use of concessional and non-concessional loans.

Looking ahead, commitments accelerated steeply from 2020 to 2022 but fell dramatically in 2023.

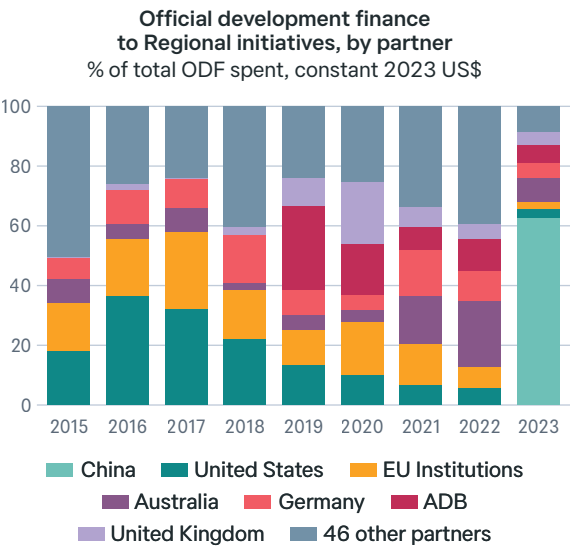
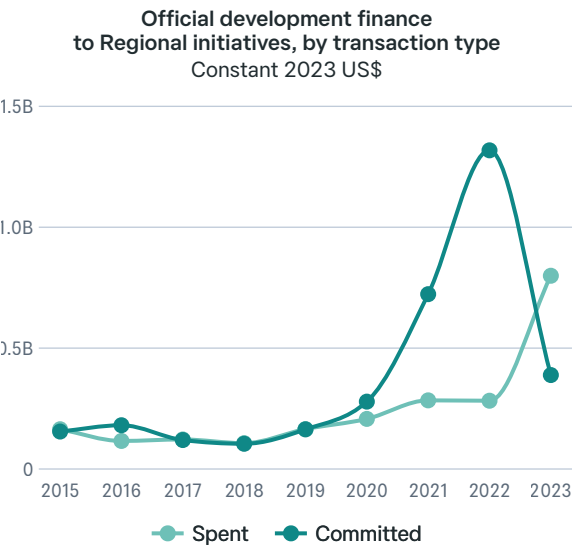
Development partners

The top contributors to Regional Initiatives from 2015 to 2023 are China, the United States, and the EU Institutions.

Though China has not been a regular supporter in this category, with no transactions recorded until 2022, in 2023 the establishment of the China–ASEAN Investment Cooperation Fund saw \$500 million disbursed. That transaction alone accounts for 64% of disbursements in 2023.

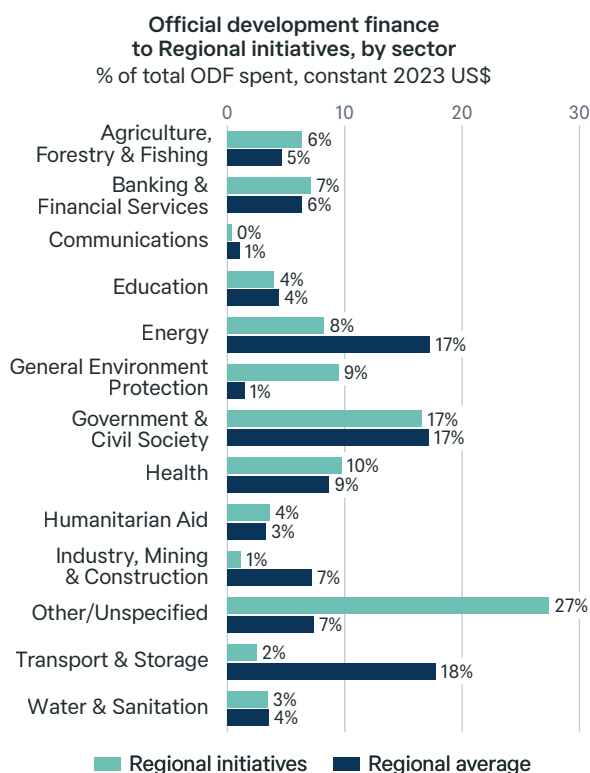
The United States has provided assistance more consistently but on a more modest scale, averaging \$26 million annually from 2015 to 2023. The United States has focused on the general environment protection, energy, and government and civil society sectors.

The EU Institutions offer support at the same scale, also averaging \$26 million annually, with an emphasis on the government and civil society sector.



Sectors

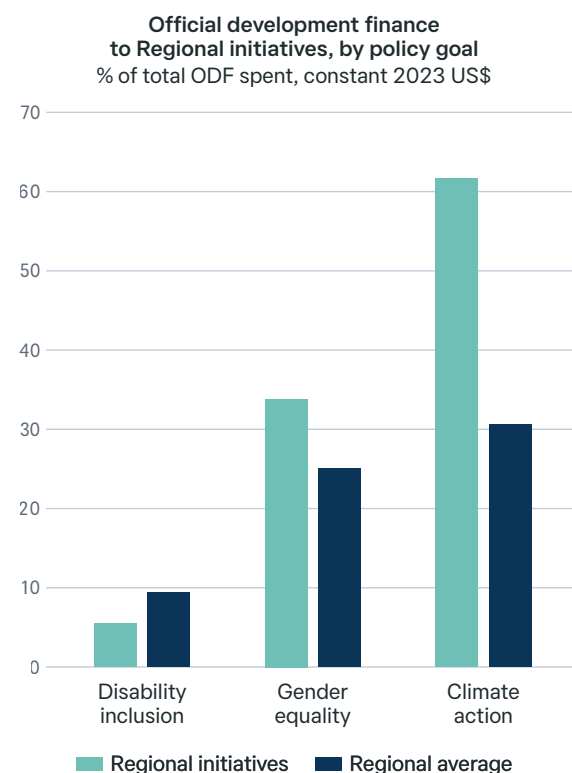
The Regional Initiatives category receives far below the regional average ODF for most infrastructure sectors, including transport and storage, communications, and energy. Above average spending (as a proportion of total ODF received) was recorded in the humanitarian aid, health, general environment protection, banking and financial services, agriculture, forestry, and fishing, and other sectors.



Policy goals

The Southeast Asia Aid Map tracks ODF with integrated policy goals across three policy domains or cross-cutting themes (as distinct from sectors): climate action, gender equality, and disability inclusion.

ODF provided on a regional or multilateral basis to Southeast Asia scores higher for gender equality (34%) and climate action (62%) integration, but lower for disability inclusion (6%).



Methodology

Key concepts

Official development finance (ODF) refers to public funds provided by governments and international organisations to promote economic and social development in low- and middle-income countries. It is the combination of official development assistance (ODA) and other official flows (OOF).

Official development assistance (ODA) is defined as financial flows that are provided by official agencies and are administered with the promotion of the economic development and welfare of developing countries as the main objective and are concessional in character.

Other official flows (OOF) consist of financial flows that do not meet the conditions for ODA either because they are not primarily aimed at development or because they do not meet Organisation for Economic Co-operation and Development (OECD) concessionality standards.

Development partners

A development partner is an entity, such as a government or organisation, that provides foreign assistance to support economic and social development in other countries. The Southeast Asia Aid Map focuses on 109 official agencies or partners, both bilateral and multilateral.

Recipients

The recipient countries in alphabetical order are Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand, Timor-Leste, and Vietnam.

Committed vs spent

There is an important distinction between what development partners have committed in the region and what they have actually spent. Large commitments,

typically in infrastructure, can often take a long time to disburse, meaning commitments can often overstate a partner's overall footprint. Spent funds are a better indication of annual flows into the region.

Sectors

Sectors have been drawn from the OECD sector categories and condensed for formatting purposes. The sectors are: agriculture, forestry, and fishing; banking and financial services; communications; education; energy; general environmental protection; government and civil society; health; humanitarian aid; industry, mining, and construction; transport and storage; water and sanitation; and other/unspecified.

Sources

There are two major existing databases for tracking aid and development finance: the OECD's Development Assistance Committee (OECD DAC) and the International Aid Transparency Initiative (IATI). Unfortunately, neither dataset has comprehensive reporting on new but significant partners such as India, China, and Taiwan. Steps have been taken by the Aid Map team to both fill the gaps in existing reporting mechanisms and validate what has been reported through official channels. The team collected, cleaned, and analysed data from open sources such as government budget documents, press releases, news media and social media, and websites of resident embassies. These sources are available via hyperlinks in the Aid Map database.

This approach, while detailed, will never be entirely comprehensive and some projects will likely be missing, especially from non-traditional partners. However, we are confident that this approach has produced the most complete picture of non-traditional development partner activities to date.

Climate, gender equality, and disability inclusion development finance

The OECD policy marker system provides an indication of the degree of mainstreaming a policy goal, such as climate change mitigation and adaptation, gender equality, or disability inclusion receives within an ODF project. The Southeast Asia Aid Map applies a novel methodology to expand coverage of climate, gender, and disability development financing data to all development partners.

A modified version of the OECD's marker system has been applied to all projects in the Aid Map dataset, sorting projects into three categories: "principal", where the policy goal (climate, gender, or disability) is explicitly stated as fundamental to the project; "significant", where the policy goal is explicitly stated but not fundamental; and "not climate/gender/disability-related", where the policy goal is not targeted in any significant way. The Aid Map team has taken at face value the marking given to projects by those development partners who self-report using the OECD system. For those partners who do not report, each project has been allocated a rating based on relevant criteria such as partner information, project descriptions, Sustainable Development Goal indicators, and OECD sub-sectors.

Data caveats

The research covers the period from 2015 to 2023. Data for 2024 and 2025 is partially complete and not representative of all aid flows to the region. Data for non-traditional development partners is likely to be incomplete. Additionally, the OECD relies on partner self-reporting of OOF flows, and partners report into it to varying degrees. It likely understates the actual volume of OOF being transferred to the region.

Review process

The clean dataset was provided to both recipient and main partner governments and organisations for confirmation. The full methodology and a representative subset of the data was sent to an independent, external organisation for robust peer review and to validate, test, and recreate the results.

Currency

In the Southeast Asia Aid Map Key Findings Report, values are expressed in constant 2023 US dollars. This is to adjust for inflation and allow for meaningful comparisons over time.

To calculate constant US dollars based on 2023 for a target year, we:

1. Find the Consumer Price Index (CPI) for 2023 and for the target year.
2. Divide the 2023 CPI by the CPI of the target year to get the adjustment factor.
3. Multiply the target year US dollar amount by this adjustment factor to get the value in constant 2023 US dollars.

This calculation removes the effects of inflation, providing a clearer view of real ODF changes rather than changes influenced by fluctuating prices.

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