



LOWY INSTITUTE SOUTHEAST ASIA AID MAP

LOWY INSTITUTE
IPDC Indo-Pacific
Development
Centre



The Southeast Asia Aid Map is a comprehensive database tracking official development finance (ODF) flows across Southeast Asia. Launched by the Lowy Institute in 2023 and updated annually, the project is supported by the Australian Department of Foreign Affairs and Trade. 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, totalling \$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

BRUNEI

\$1 billion	SPENT
\$1 billion	COMMITTED
31	PROJECTS
7	DEVELOPMENT PARTNERS

Brunei is a high-income country, one of only two in Southeast Asia.

In 2023, it received \$600 in official development finance.

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.

