



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](https://seamap.lowyinstitute.org)

# INDONESIA

\$100 billion	SPENT
\$119 billion	COMMITTED
20,456	PROJECTS
85	DEVELOPMENT PARTNERS

Indonesia is an upper-middle income economy according to the World Bank, having graduated from lower-middle income status in July 2023.

In 2023, Indonesia received \$10 billion in official development finance. 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.

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. The energy and government and civil society sectors receive the most ODF in Indonesia, each accounting for 21% of the total. As a proportion of total ODF, spending in the transport and storage sector is around half the regional average.

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%).

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.

