



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

LAOS

| | |
|-----------------------|-----------------------------|
| \$16.5 billion | SPENT |
| \$21.4 billion | COMMITTED |
| 11,522 | PROJECTS |
| 75 | DEVELOPMENT PARTNERS |

Laos is a lower-middle income economy according to the World Bank, and a UN-designated Least Developed Country.

In 2023, Laos received \$945 million in official development finance. 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.

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%).

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%).

Laos provides an average of \$93,000 annually in intra-regional ODF, the second-lowest amount in the region. However, Laos is the largest recipient of intra-regional ODF, having received more than two-thirds of all intra-regional ODF since 2015.

