



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

MALAYSIA

\$11.6 billion	SPENT
\$20.9 billion	COMMITTED
5,548	PROJECTS
59	DEVELOPMENT PARTNERS

Malaysia is an upper-middle income economy according to the World Bank.

In 2023, Malaysia received \$1.8 billion in official development finance.

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.

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

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.

Over 2015–23, Malaysia received below average proportions of ODF targeting disability inclusion, gender equality and climate action.

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%.

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.

