



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

MYANMAR

\$23.4 billion	SPENT
\$48.5 billion	COMMITTED
18,483	PROJECTS
77	DEVELOPMENT PARTNERS

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

In 2023, Myanmar received \$1.4 billion in official development finance. 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.

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.

The amount spent on humanitarian aid in Myanmar is almost four times the regional average, indicating partners’ reactivity to the ongoing violence.

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%).

Myanmar provides the lowest volume of intra-regional ODF in Southeast Asia, averaging \$84,000 annually. Myanmar is the second-largest recipient of support from its neighbours, behind only Laos.

