



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

PHILIPPINES

\$49 billion	SPENT
\$99 billion	COMMITTED
17,587	PROJECTS
77	DEVELOPMENT PARTNERS

The Philippines is a lower-middle income economy according to the World Bank.

In 2023, it received \$7.2 billion in official development finance. The Asian Development Bank (ADB) is the Philippines’ primary development partner, accounting for more than one-third of its ODF since 2015. The World Bank accounts for 25% and Japan for 18%.

In 2020, the ADB rapidly ramped up its operations in the Philippines in response to the pandemic, with aid jumping from \$1.1 billion in 2019 to \$5.2 billion in 2020 (48% of the Philippines’ total ODF in that year). Since then, levels have remained elevated above \$2 billion annually.

The top sector in the Philippines by spending is government and civil society, which accounts for 27% of the Philippines’ total ODF over 2015–23, well above the regional average of 17%. The Philippines also exceeds its peers in terms of ODF spending in humanitarian aid, health, general environment protection, education, communications, banking and financial services, and agriculture, forestry, and fishing. ODF spending on energy in the Philippines is just a fraction of the regional average, at 1% compared to 17%.

Over 2015–23, the Philippines received considerably higher policy goal-integrated ODF as a proportion of total ODF across policy domains: 43% compared with 25% for gender equality, 19% compared with 9% for disability inclusion, and 39% compared with 31% for climate action.

The Philippines is a very minor provider of development assistance to its neighbours, accounting for just 0.3% of total intra-regional ODF from 2015 to 2023.

