



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

TIMOR-LESTE

\$2.8 billion	SPENT
\$3.4 billion	COMMITTED
6,250	PROJECTS
53	DEVELOPMENT PARTNERS

Timor-Leste is a lower-middle income economy, a UN-designated Least Developed Country, and the smallest economy in Southeast Asia.

In 2023 it received \$300 million in official development finance. Australia was responsible for more than one-quarter of ODF to Timor-Leste from 2015–23, and at times has accounted for one-third of incoming ODF (in 2021 and 2023).

Australia's support is directed primarily, and increasingly, to the government and civil society sector, largely for human development, sub-national governance, and fiscal budget support programs. Australia provides its ODF to Timor-Leste entirely through grants.

Japan, the United States, and the Asian Development Bank (ADB) made up Timor-Leste's second tier of partners, each contributing around 10% of total incoming ODF over 2015–23.

Timor-Leste receives the most ODF in the government and civil society sector, accounting for 25% over 2015–23, mostly for public sector institution capacity-building and employment policy development. The second-largest ODF sector in Timor-Leste is transport and storage, dominated by construction of roads and water transport infrastructure such as ports.

Over 2015–23, 13% of Timor-Leste's ODF was marked for disability inclusion, 44% for gender equality, and 38% for climate action.

Timor-Leste is a small and irregular provider of assistance to its neighbours, in part because it is not yet a formal member of the Association of Southeast Asian Nations. It has provided modest amounts of humanitarian aid to Thailand, Malaysia, Indonesia, Laos, and Myanmar, but has not disbursed any intra-regional ODF since 2019.

