



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

VIETNAM

\$49.6 billion	SPENT
\$52.3 billion	COMMITTED
22,538	PROJECTS
80	DEVELOPMENT PARTNERS

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

In 2023 it received \$2.9 billion in official development finance. Japan is Vietnam's primary development partner, accounting for almost one-fifth of its total ODF received since 2015. The World Bank and South Korea comprise Vietnam's second tier of partners, followed by the Asian Development Bank (ADB) and China.

Japan's assistance is delivered largely through concessional loans (90% of its total ODF to Vietnam) and has decreased over time from a 2016 peak of close to \$2 billion to a post-Covid (2021–23) annual average of \$540 million. The World Bank's support to Vietnam has also diminished, from almost \$1.5 billion in 2015 to \$400 million in 2023.

The top sector in Vietnam by spending is energy, which accounts for close to a quarter of Vietnam's total ODF over 2015–23, well above the regional average of 17%. Vietnam also exceeds its peers in terms of ODF spending in water and sanitation, transport and storage, industry, mining, and construction, general environment protection, and education. Over 2015–23, Vietnam received less than the regional average for ODF targeting climate action (26%), disability inclusion (4%), and gender equality (16%).

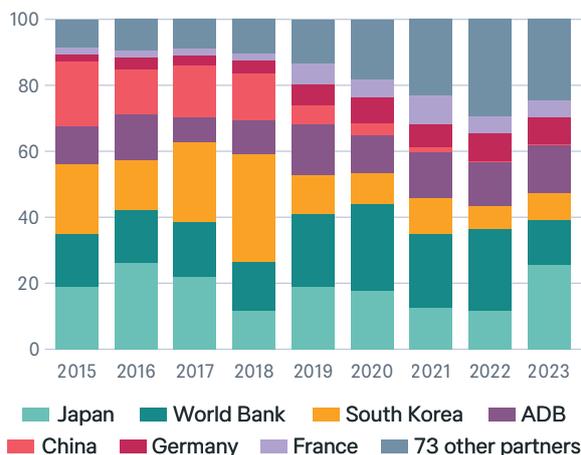
Vietnam has provided an annual average of \$17 million in intra-regional ODF since 2015. Its support has mostly been extended to its neighbour Laos, with other disbursements to Cambodia, Indonesia, and the Philippines as well as contributions to regional efforts.

Vietnam is the fourth-largest recipient of intra-regional ODF, mostly from Thailand.

Official development finance to Vietnam, by transaction type
Constant 2023 US\$



Official development finance to Vietnam, by partner
% of total ODF spent, constant 2023 US\$



Official development finance to Vietnam, by policy goal
% of total ODF spent, constant 2023 US\$

