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Big picture on macrofiscal and governance issues in the region – culling relevant evidence from *Governance at a Glance: Southeast Asia 2025* (OECD and ADB)



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ADB

Emerging Macroeconomic and Governance Challenges and Opportunities

Workshop | 20–23 April 2026 | Manila, Philippines

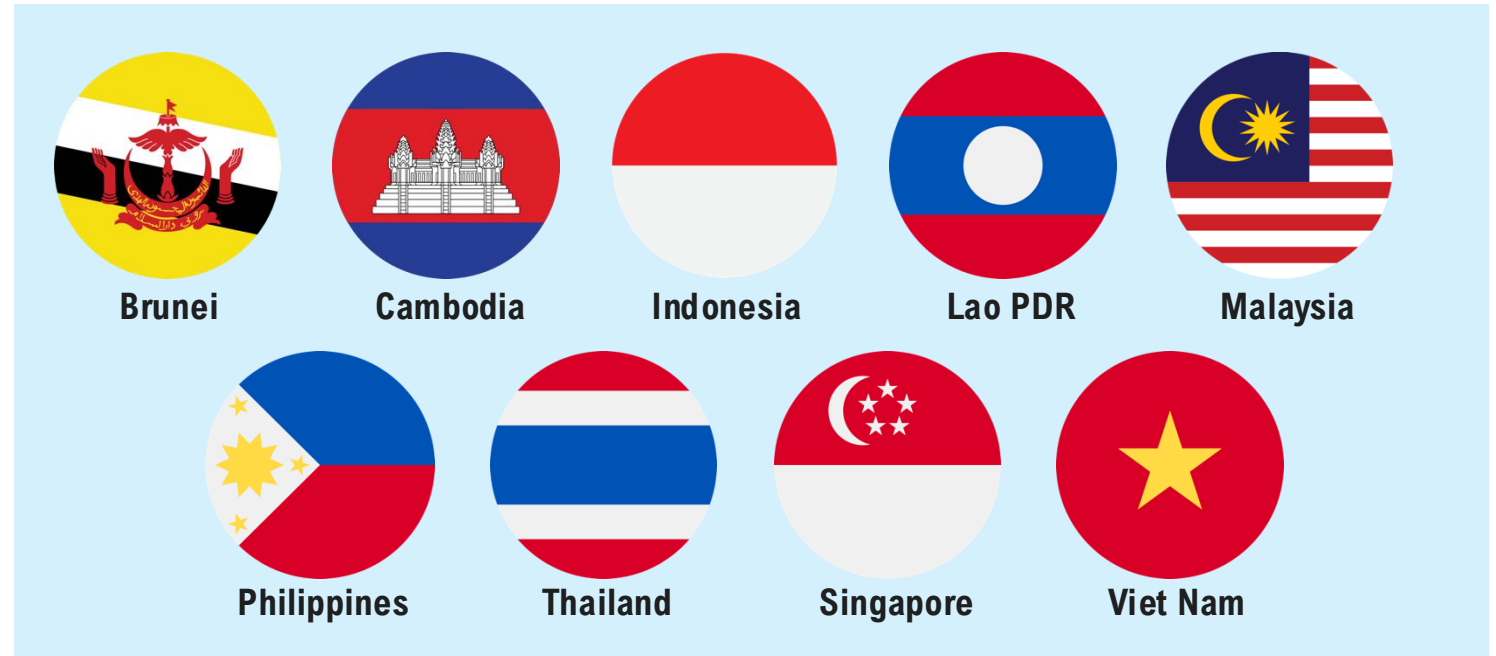
Government at a Glance: Southeast Asia 2025

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21 April 2026



Government at a Glance: Southeast Asia 2025

- Collaboration between **OECD**, **ADB** and **Southeast Asian governments** on this **2nd edition of Government at a Glance: Southeast Asia**
- Financial support provided by the **Republic of Korea**

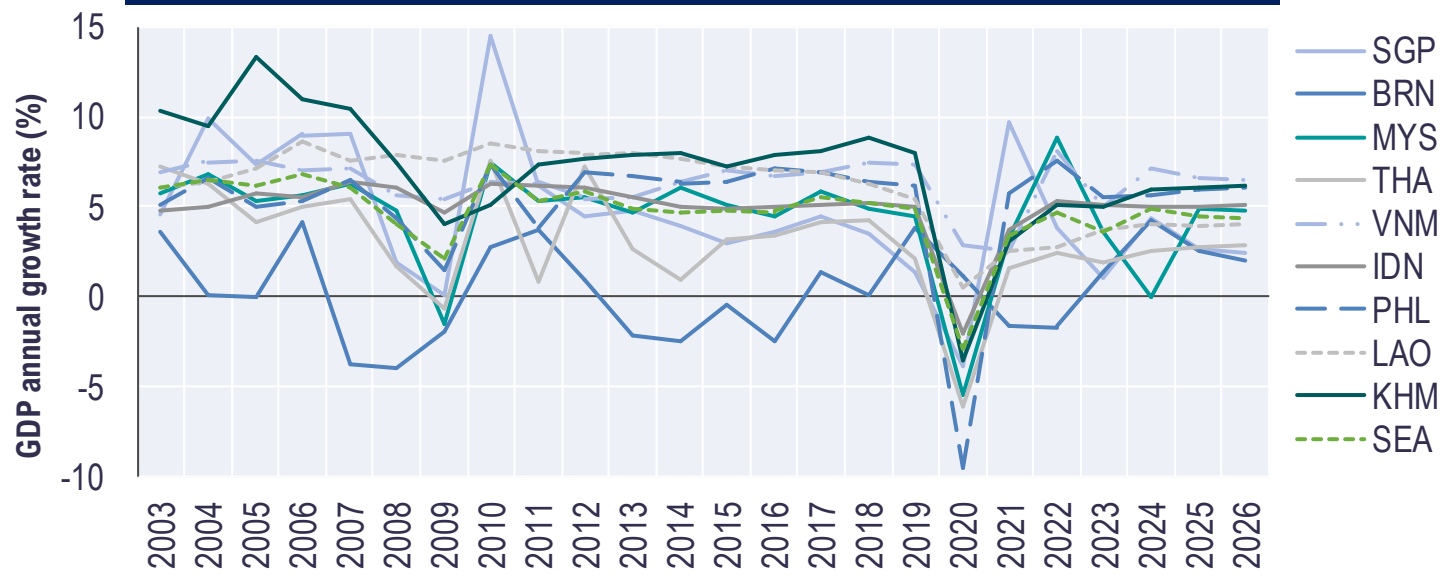


Public Governance Programme
OECD Korea Policy Centre



Southeast Asia has achieved remarkable gains

Nominal GDP growth rate of SEA countries, 2003-2026

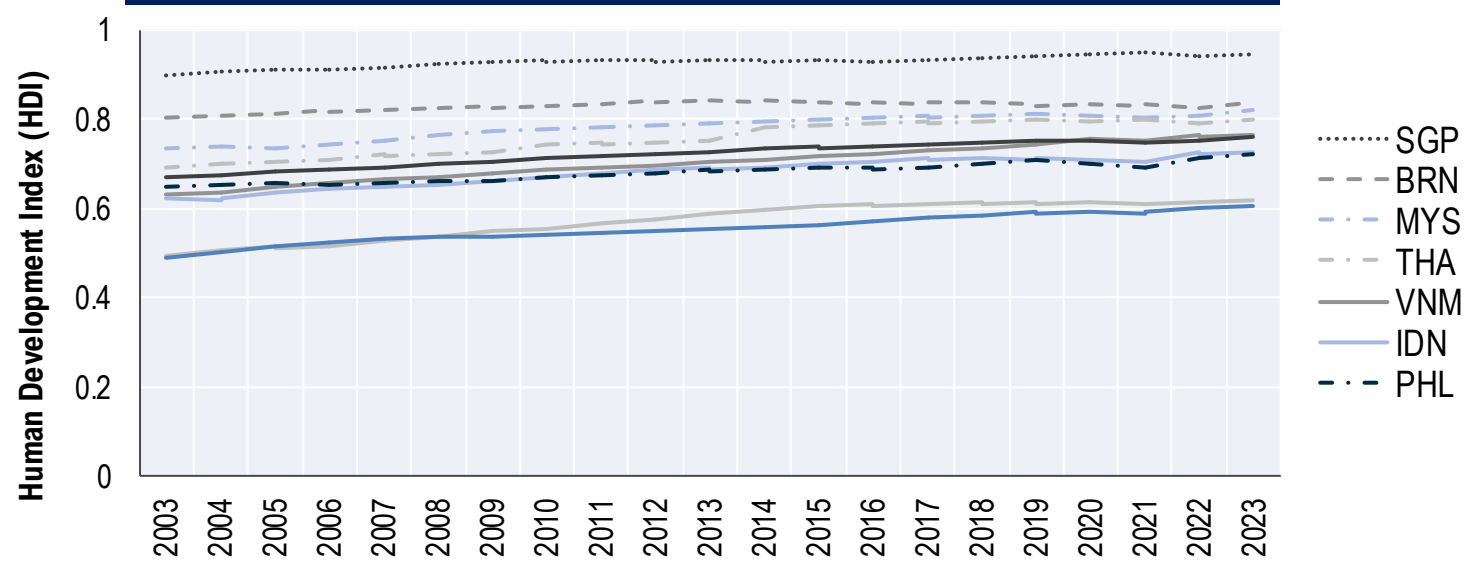


Growth has been high and sustained over the past 20 years

Recovery of economic growth after the COVID-19 pandemic was rapid

Average growth in the region is broadly back to the pre-COVID-pandemic trend

Human Development Index (HDI) scores of SEA countries, 2003-2023



Development levels across the region are quite varied, but all are making progress

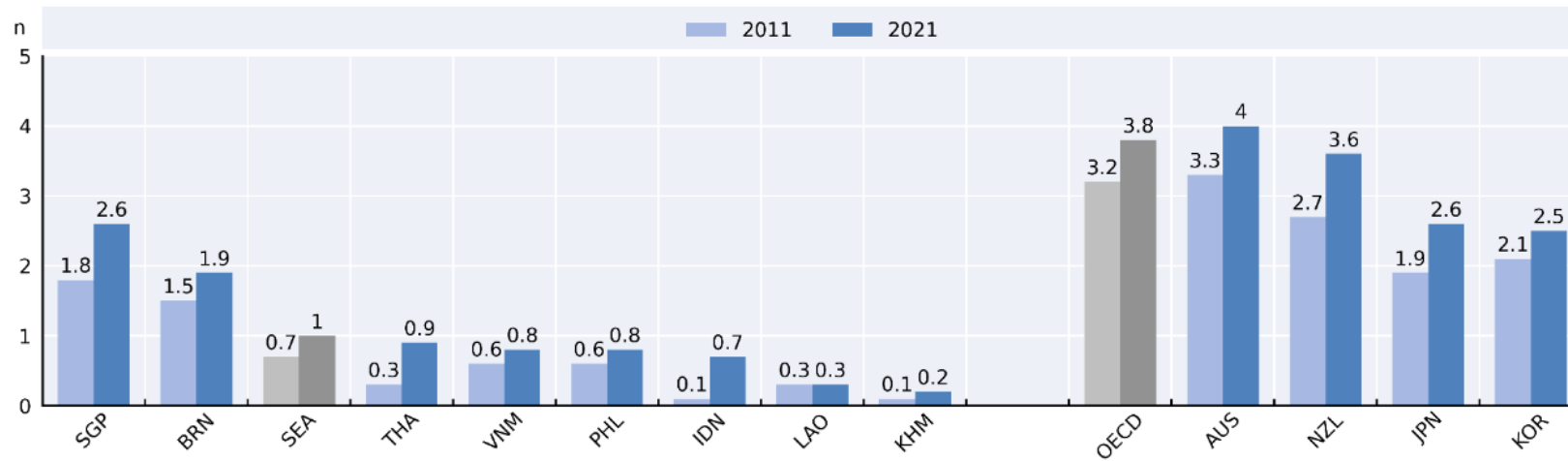
Regional improvements in poverty, education and healthcare levels

8 of 9 improved HDI scores



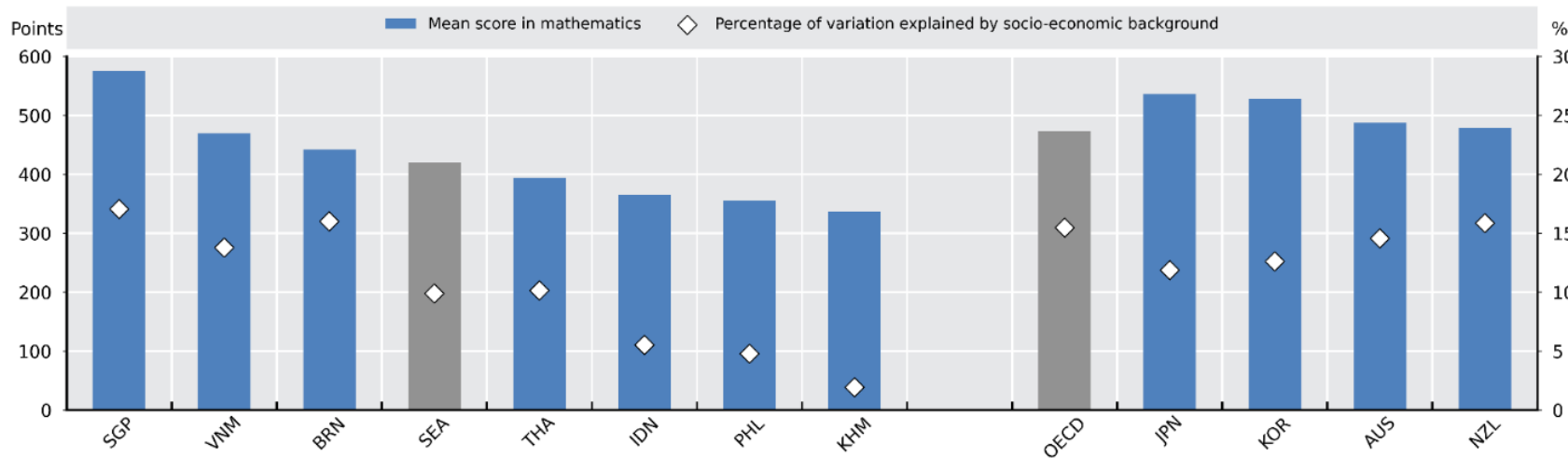
These gains are visible in policy outcomes experienced by the public

Number of physicians per 1000 people



Healthcare access has improved in 7 of 8 countries, as measured by availability of doctors.

Mean score in mathematics (and percentage of variance explained by socio-economic status), 2022



Educational attainment (math test scores) are converging to the OECD average

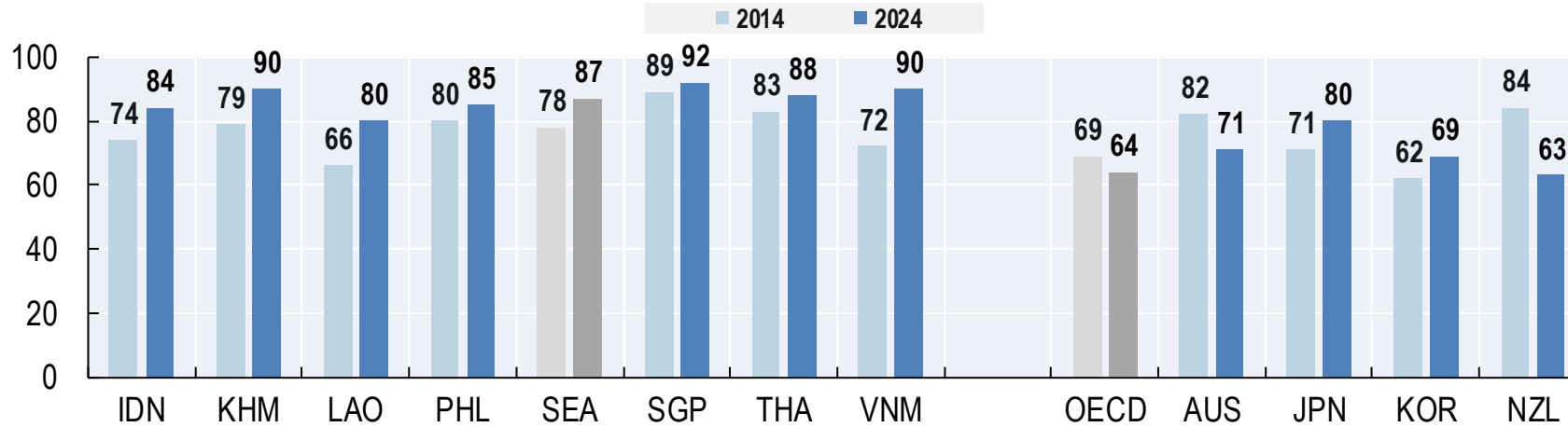
Other services examined in the report are also becoming more accessible and affordable (civil justice)

Source: OECD Government at a Glance: Southeast Asia 2025. Health: OECD calculations from WHO (2025) National Health Workforce Accounts Data Portal. Education: from OECD (2023), PISA 2022 Results (Volume I), <https://doi.org/10.1787/53f23881-en>.

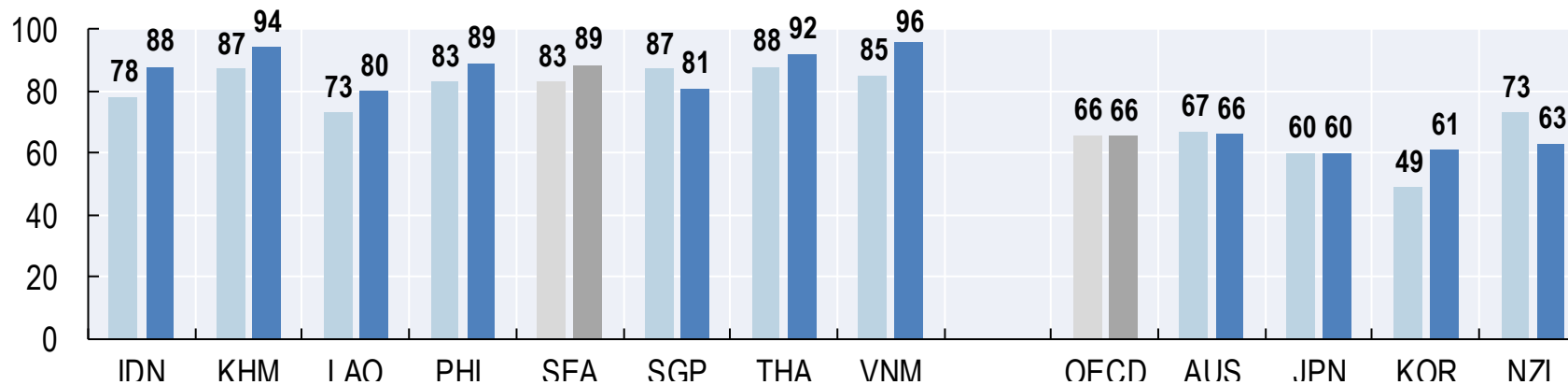


Public satisfaction has also increased

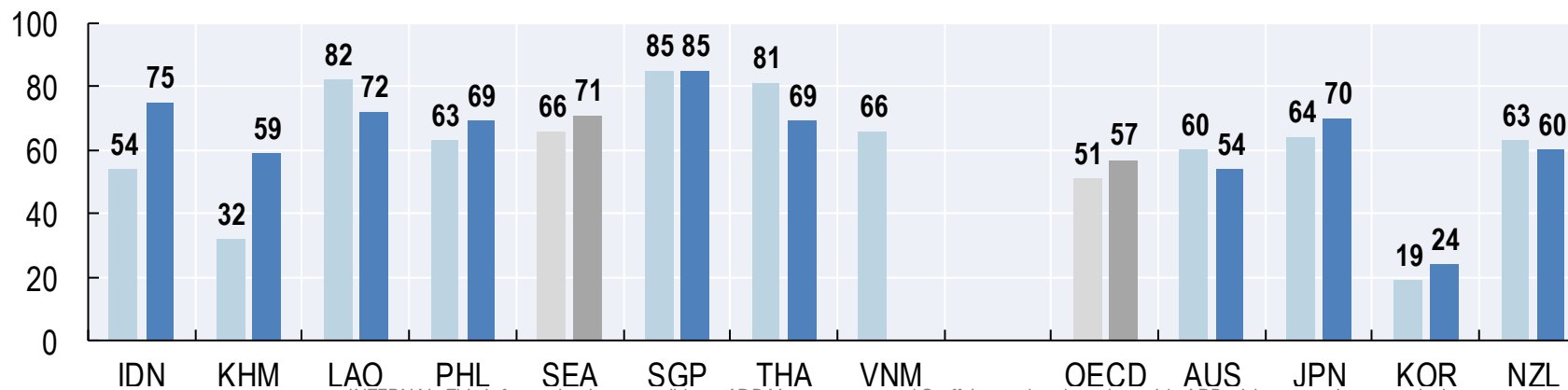
% of the public satisfied with healthcare



% of the public satisfied with education



% of the public with confidence in judicial services



Satisfaction in SEA has risen to high levels in the past decade, as improvements have been experienced by the public

This supports trust in institutions and helps to create a more supportive environment for governance reform

Source: OECD Government at a Glance: Southeast Asia 2025. OECD calculations from Gallup World Poll



Governance reform priorities

Navigating the complex challenges ahead will require effective, efficient and agile public institutions

**Build Prosperity
& Resilience**

**Manage public
finances sustainability**

**Build resilience to
environmental risks**

**Build Human-centred
institutions & Public
services**

**Make public services
more responsive**

**Promote public
engagement &
feedback**



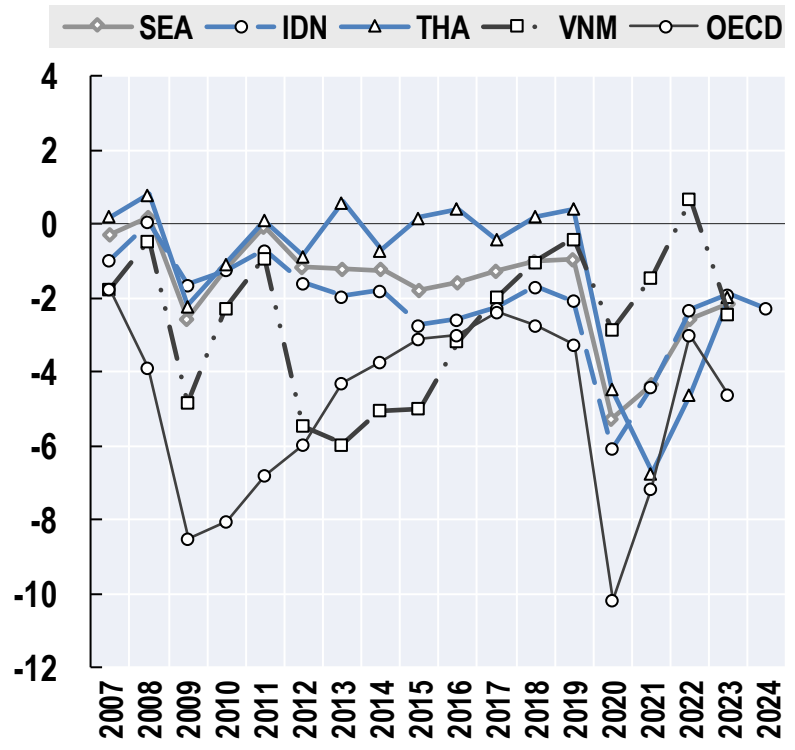
Sustainable public finances will be important for prosperity and resilience

The COVID-19 pandemic led to higher public debt, and more constrained resources in the medium term

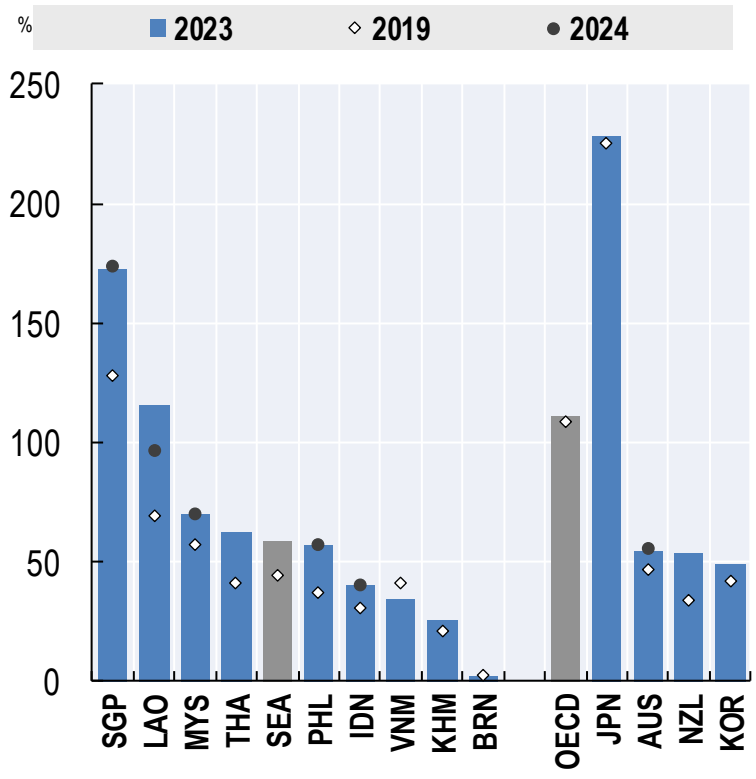
Governments across the region have seen little change in revenue levels

Effective governance and efficient government processes will be critical to performance

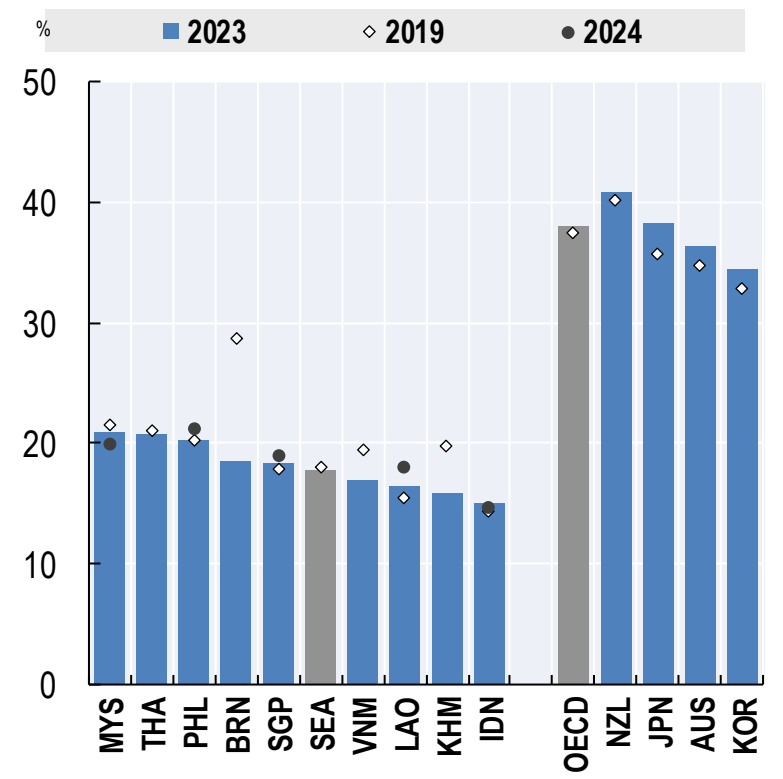
General government fiscal balance as %GDP



General government gross debt as %GDP



General government revenues as %GDP



Source: OECD Government at a Glance: Southeast Asia 2025. Data drawn from IMF World Economic Outlook April 2025

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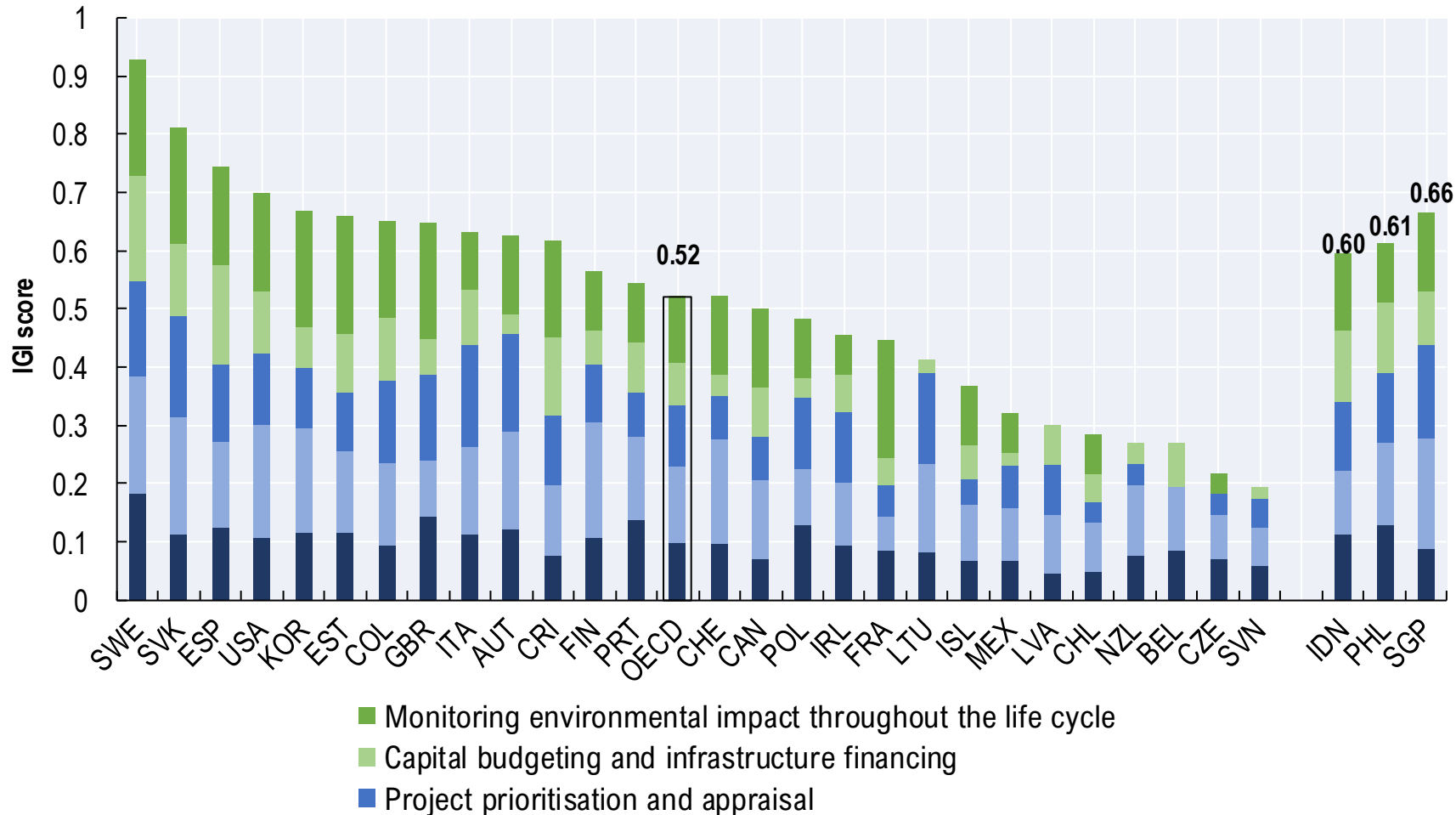


Governance practices can help build resilience to environmental risks

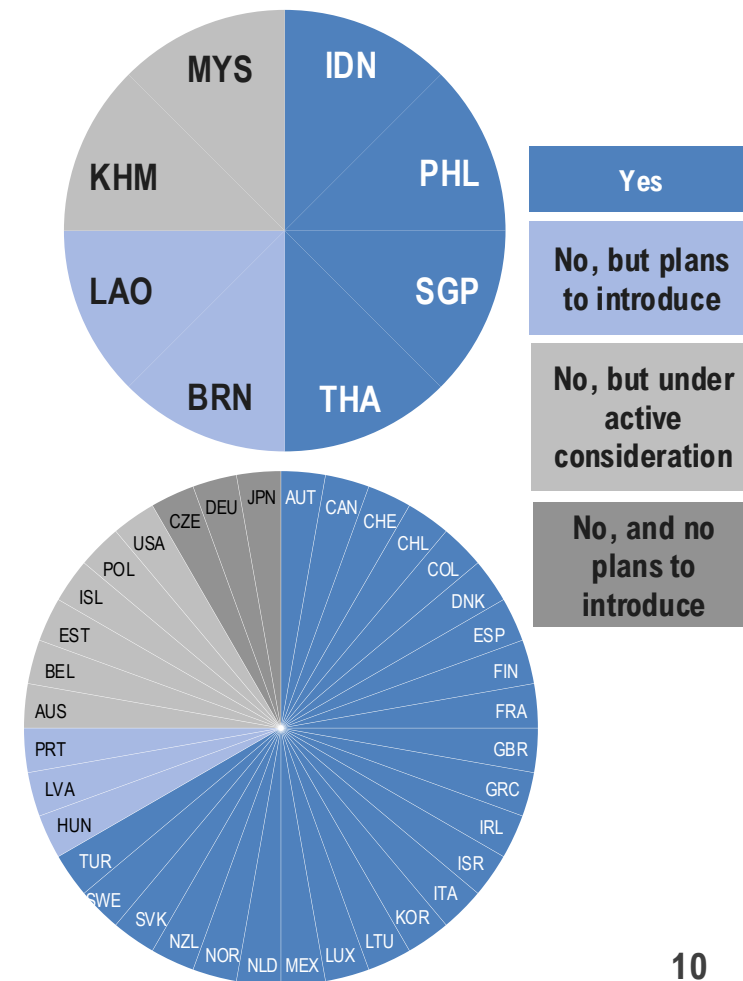
SEA countries for which data is available are strong performers on green infrastructure

Other areas of greening public administration, such as green budgeting, can be further developed

Delivering environmentally sustainable and resilient infrastructure



Use of Green Budgeting



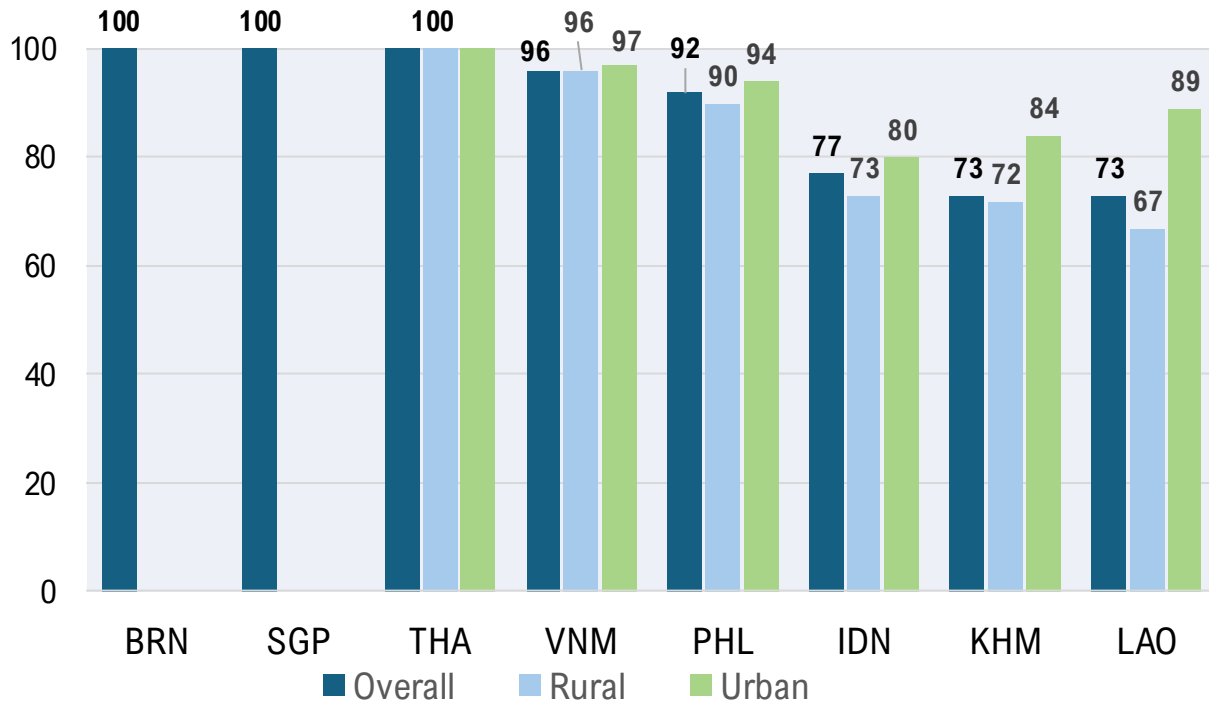


Governments can make services more responsive and improve coverage

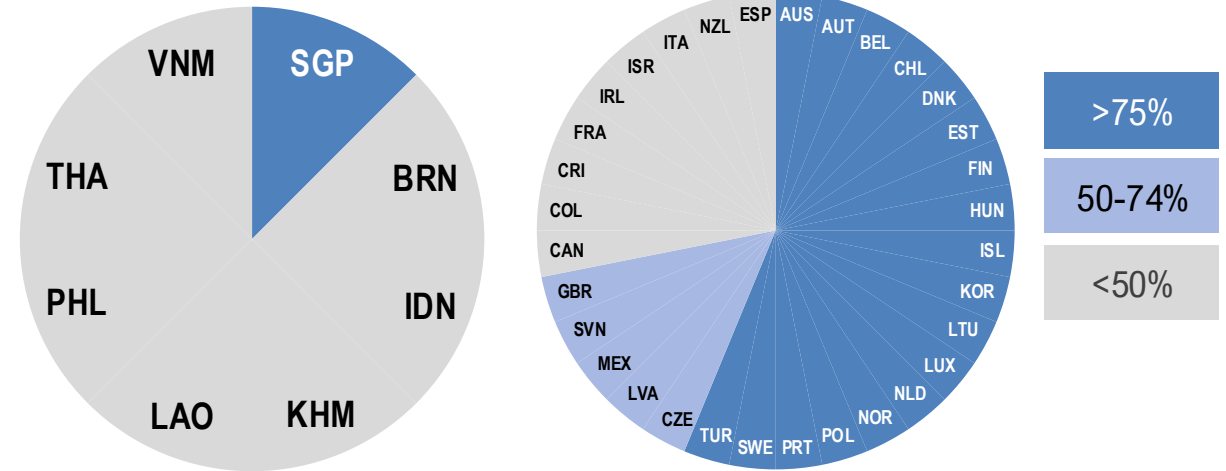
Basic administrative services like birth registration are not always universally accessible

Digital access to public services in SEA is less widespread than in OECD countries, and uptake rates remain low

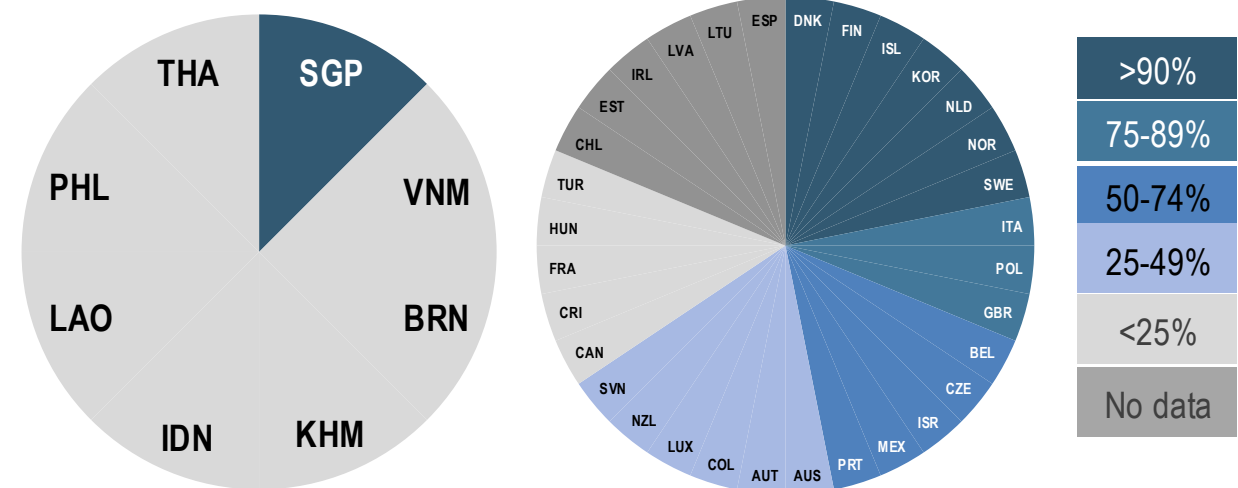
% children under 5 whose births are registered



% online public services accessible through secure and user-friendly digital identity



% eligible population using digital identity to access public services





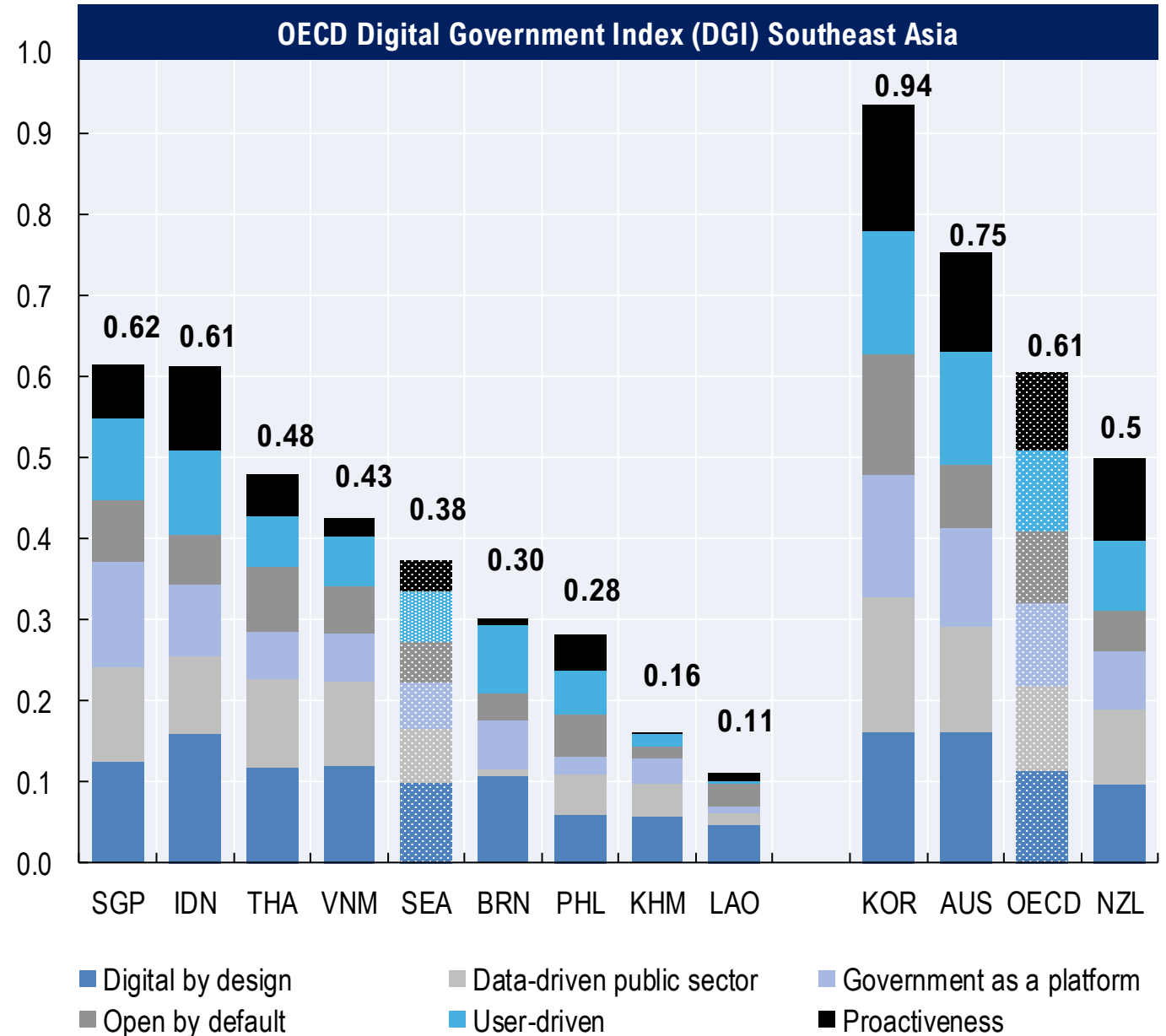
More can be done to advance digital government, including AI

Southeast Asia can improve on digital government and open data

The region scores 0.37 (vs 0.61 for OECD countries) on OECD Digital Government Index

Proactiveness - anticipating and responding to citizens' and businesses' needs - is the area with most room for improvement

Technology, including AI, can enable leaps forward in development and governance

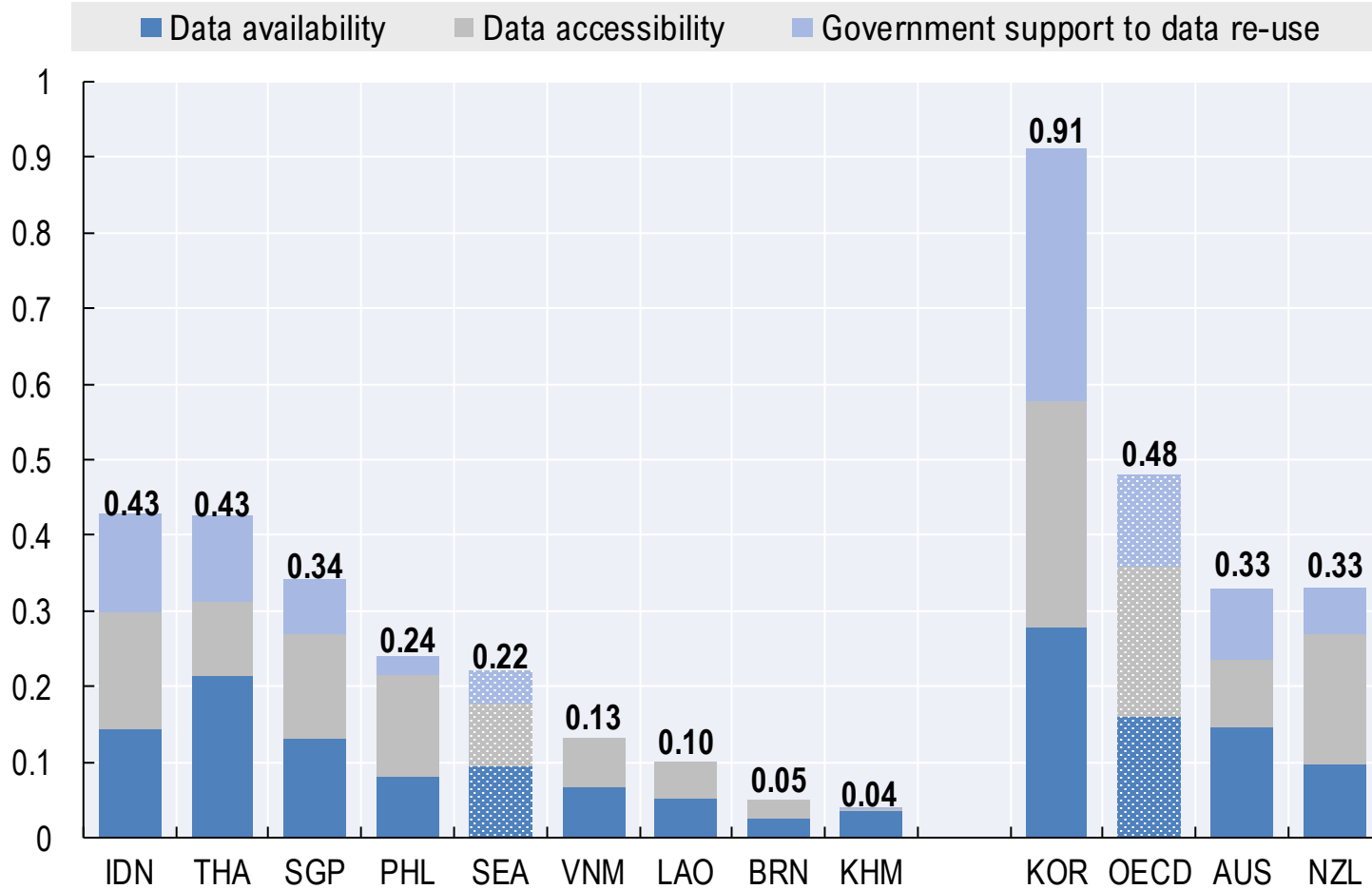




Governments can make processes more open and responsive

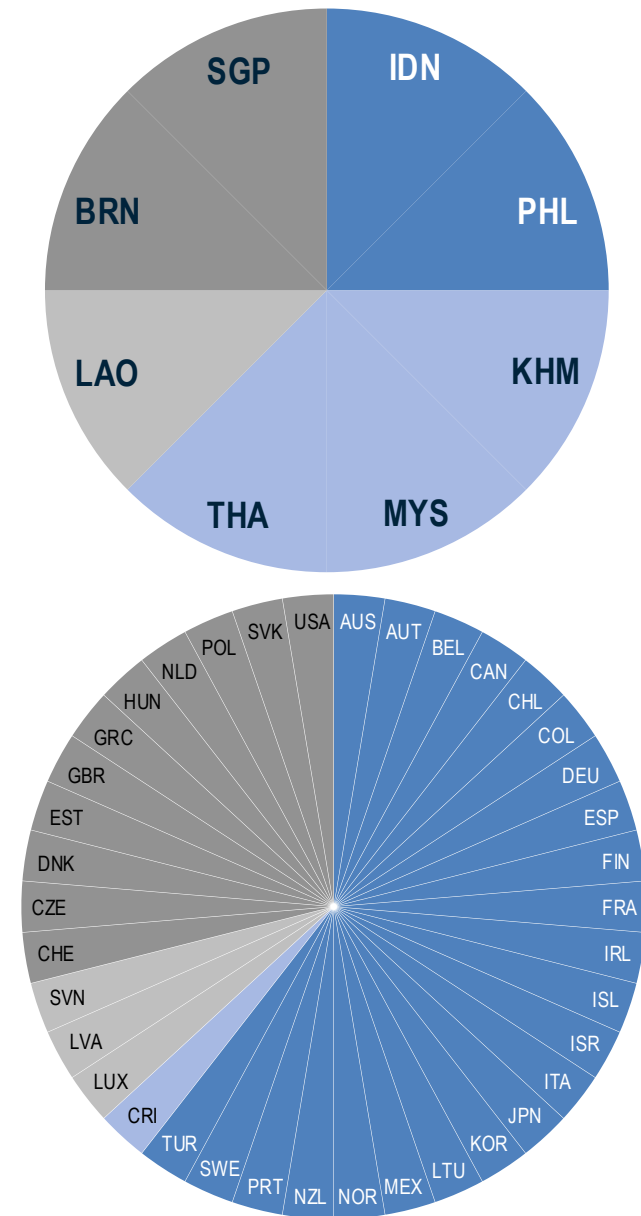
Governments can improve both on understanding the public's needs, and on making government more open and transparent

OECD Open, Useful, Reusable Data (OURdata) Index, SE Asia



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Use of Gender Budgeting



- Yes
- No, but plans to introduce
- No, but under active consideration
- No, and no plans to introduce

Source: OECD Government at a Glance: Southeast Asia 2025 13

Report

Government at a Glance Southeast Asia 2025

oe.cd/gov-at-a-glance-SEA-2025



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**Government at a Glance:
Southeast Asia 2025**

