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Chinese Investments in Southeast Asia

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Chinese Investments in Southeast Asia

Patterns and Significance

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EXECUTIVE SUMMARY

- Southeast Asia's growing economic linkages and dependence on China for investment in infrastructure and industry have generated political opportunities and strategic concerns in equal measure.
- How much has Chinese investment grown in Southeast Asia in the past two decades, and how significant is this increase? How does Chinese investment compare to other sources of investment in the region? Is it more significant in some countries than in others, or in specific sectors more than others? What are the political and strategic implications of growing large Chinese investments in the region?
- This project investigates the levels, trends and distribution of Chinese investment in Southeast Asia, providing an important regionwide analysis that allows comparisons and facilitates policy calibration and focus.
- The first section of the report presents an overview of its findings about the regionwide trends and key changes in large Chinese investment, outlining the distribution of Chinese investment across Southeast Asian countries and economic sectors from 2005 to 2019.
- It then explores the political and strategic significance of these Chinese investments in Southeast Asia in terms of vulnerability and dependency, and strategic integration.
- The second section of the report contains the project's detailed quantitative analysis of large Chinese investment in Southeast Asia, presented by country and by sector. This dataset can be used by others for further analysis.
- The Appendix explains the definitions, coding and other decisions made in the construction of the dataset, highlights its uses, and points out some of its limitations.

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