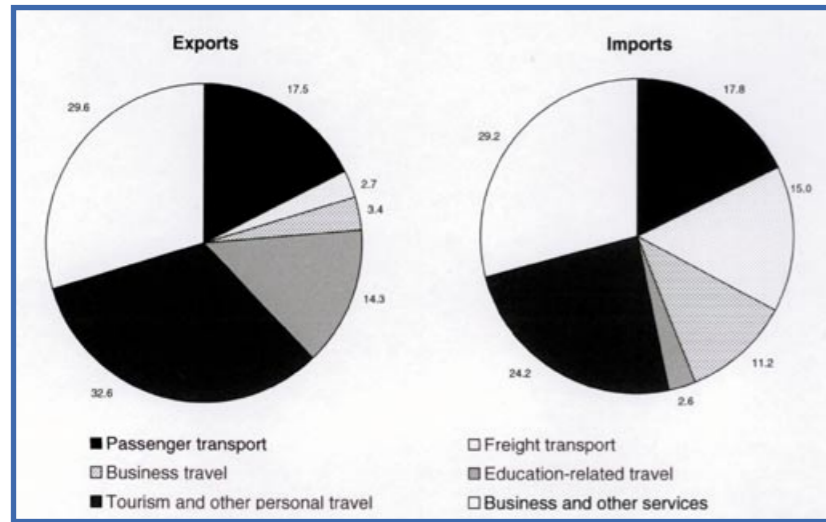
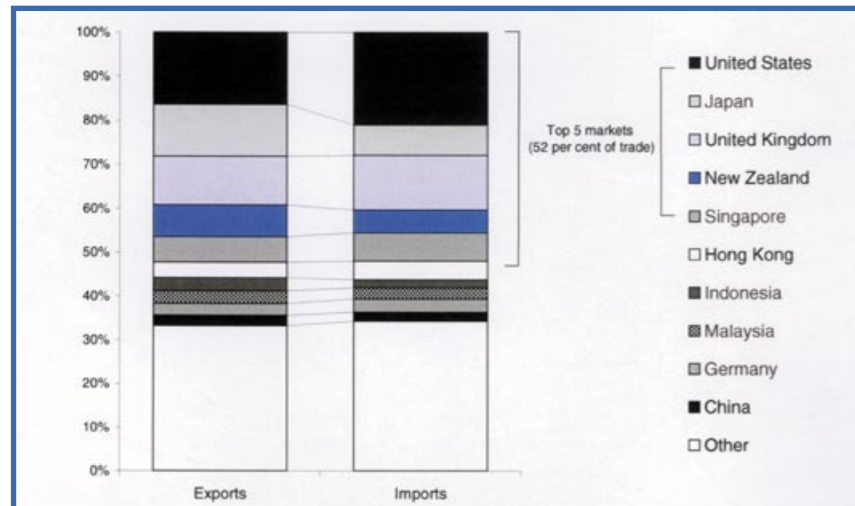


**Figure 7: Individual Service Industry contribution to Growth in Australia's Service Exports and Imports**



1985-86 to 2000-01 Current prices, per cent share. Reprinted from Australia's Services Sector: *A Study in Diversity. Productivity Commission Staff Research Paper, 2002*, page 101, copyright Commonwealth of Australia reproduced by permission.

**Figure 8: Australia's Major Services Trading Partners — share of Service exports and imports in 1999-00**



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## To Manage it, you have to Measure it...

All around the world, trade in services is notoriously under-measured. Services are difficult to measure and difficult to define.

For many services, a physical presence is required between supplier and customer. So many service providers find it necessary to establish a commercial presence through a foreign affiliate in countries where they wish to sell.

Data on foreign affiliates' trade in services are beginning to be collected — the ABS is due to release its first foreign affiliate trade survey in March 2004. Recent US data show that sales of majority US-owned service affiliates outside the US now exceed cross-border US service exports.

Informed guesses place world trade in services at around 33% of world trade, rather than the recorded 23%. This figure still does not take indirect embedded services into account.

Remapping the economy to deal with this information deficit will help improve the policy environment for services industries.

The Australian Services Roundtable was founded in late 2001. The Roundtable is the major private sector voice for Australia's services industries.



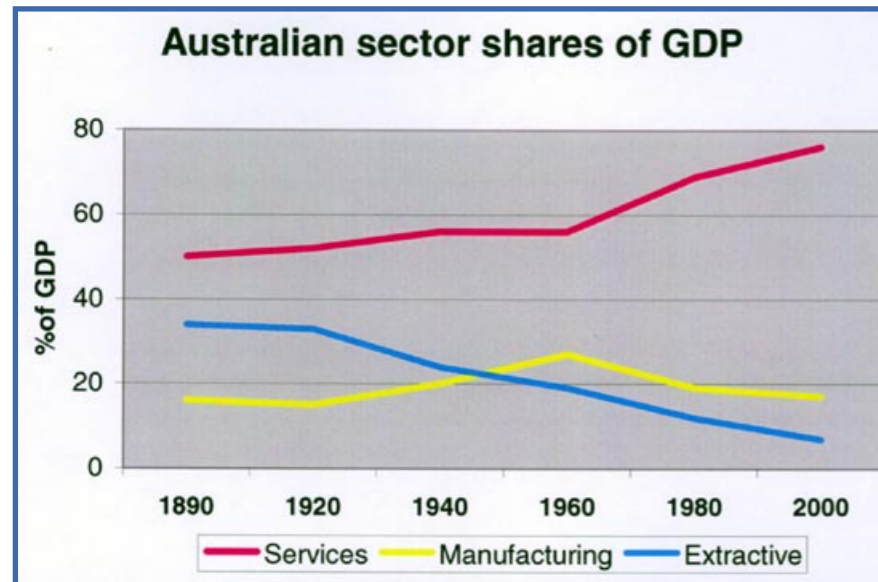
Enquiries to Australian Services Roundtable  
 Level 5, 11 London Circuit, Canberra. ACT 2601.  
 Tel (612) 6248 4226 Fax (612) 6248 4295  
[www.servicesaustralia.org.au](http://www.servicesaustralia.org.au)  
 E-mail; [services@tesol.com.au](mailto:services@tesol.com.au)

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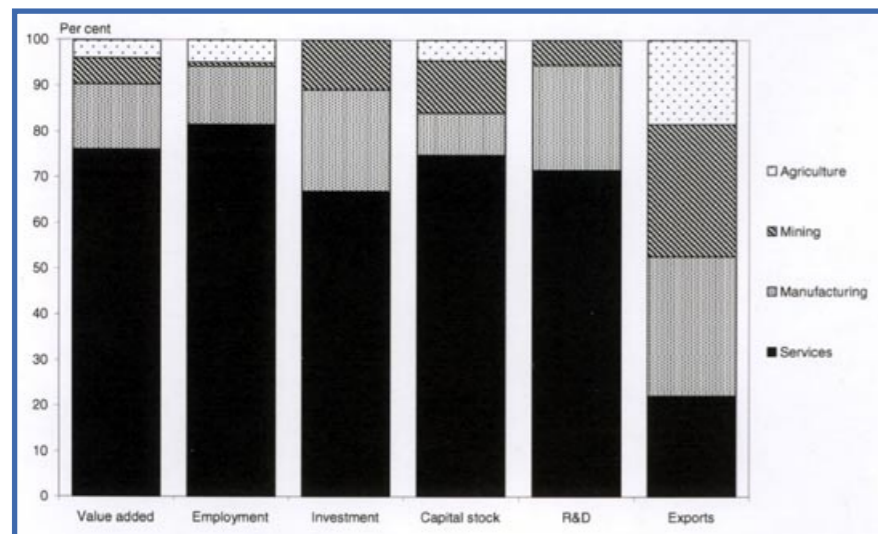
**Services Sector in Australia  
 Statistical Card : 2004 Edition**

**Figure 1: Upward Trend of Services in Australia's GDP**



Reprinted from *Knowledge-Based Services Global Initiative*, Austrade Internal Working Paper, 2002, page 22

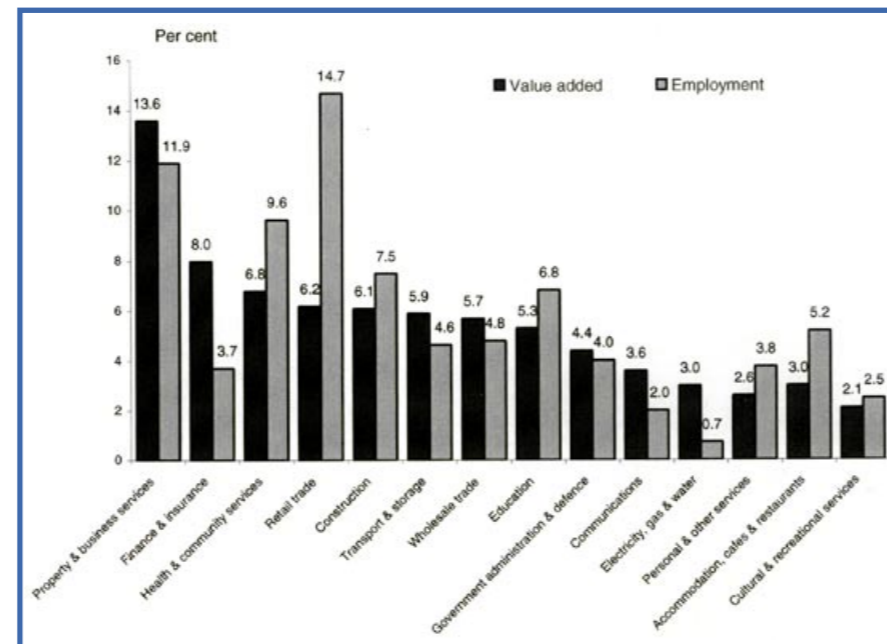
**Figure 2: Services contributions to Australian Economic Activity, including Investment**



2000-01 Current prices: 'Ownership of dwellings' is omitted to allow value added shares to sum to 100. R&D estimates relate to 2000 and represent aggregates of government, education and business R&D expenditures. Around 40 per cent of private business R&D was undertaken by service firms in 2000, with manufacturing firms contributing more than half in 2000. Agriculture is excluded from the R&D data due to lack of suitable data. Investment data also relate to 2000 and are drawn from the ABS Private New Capital Expenditure Survey, which excludes all second hand investment purchases, as well as all investment expenditures by the agricultural sector and all public expenditure.

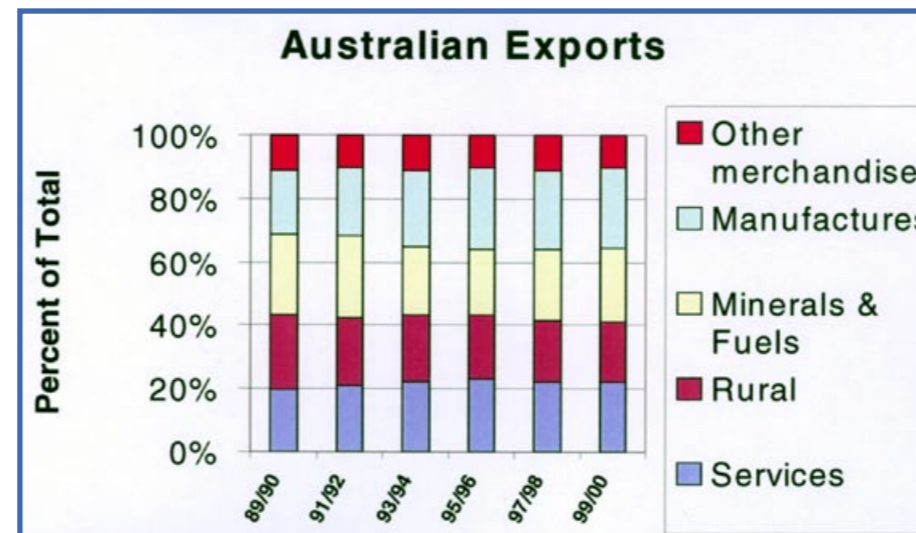
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**Figure 3: Individual Service industry contributions to National Output and Employment**



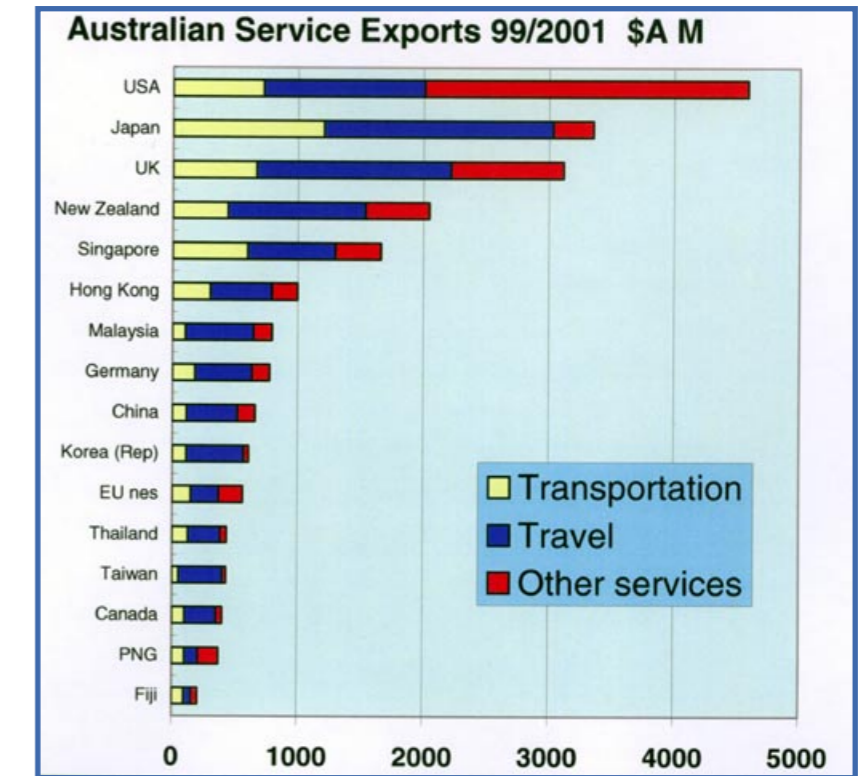
2000-01 Reprinted from Australia's Services Sector: *A Study in Diversity, Productivity Commission Staff Research Paper, 2002*, page 43, copyright Commonwealth of Australia reproduced by permission.

**Figure 4: Upward Trend in Australia's Services Exports**



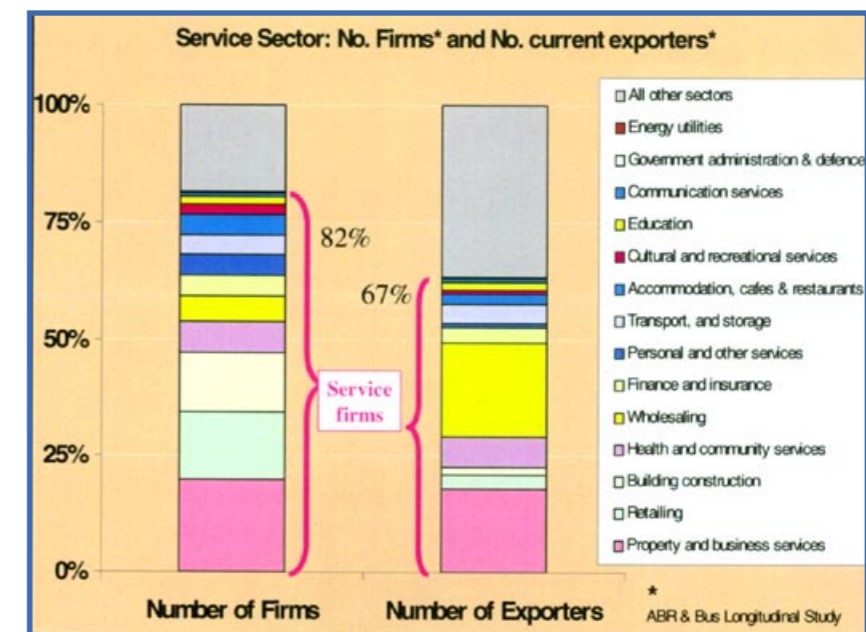
Reprinted from *Knowledge-Based Services Global Initiative*, Austrade Internal Working Paper, 2002, page 26

**Figure 5: Destinations of Australia's Services Exports**



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**Figure 6: The Importance of Australian Services Companies**



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