

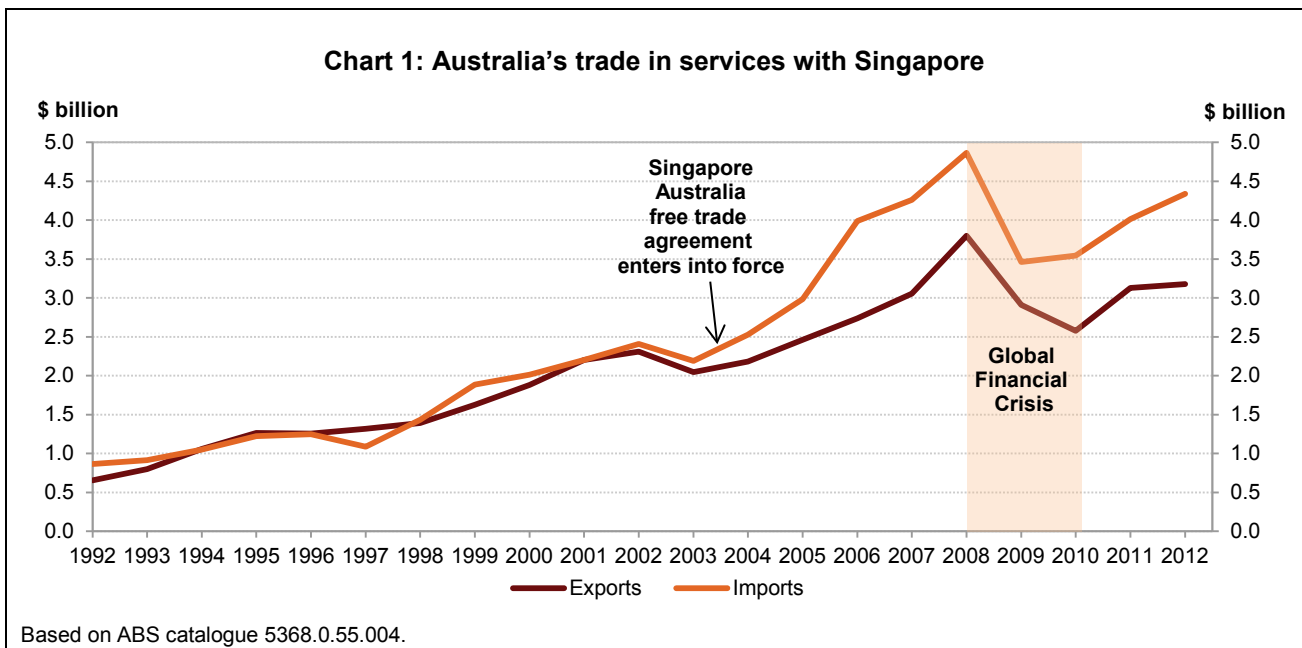
Australia's Trade in Services with Singapore

Singapore was Australia's fourth largest two-way trade in services partner in 2012. Australia's two-way trade in services with Singapore was valued at \$7.5 billion and accounted for one quarter of Australia's total trade in goods and services with Singapore. Two-way trade in services has grown by an average 8.4 per cent per annum over the past 20 years, above the average for Australia's total services trade with the world of 6.0 per cent per annum. Singapore was Australia's fifth largest services exports market (second largest market in Asia after China) in 2012 and Australia's third largest source of services imports (largest source from Asia).

Long terms trends in Australia's services trade with Singapore

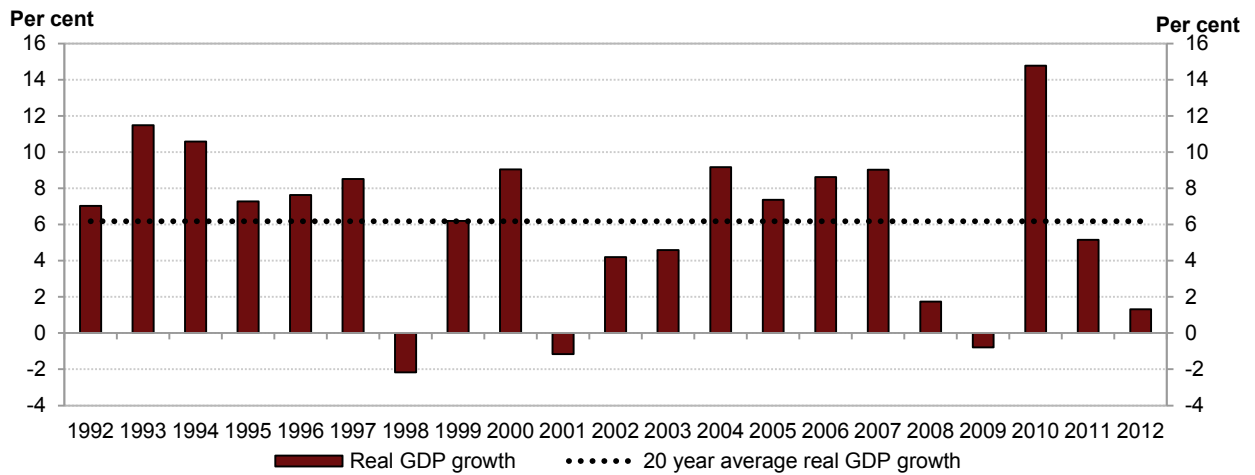
Australia's exports of services to Singapore increased on average 7.5 per cent per annum over the past 20 years to be valued at \$3.2 billion in 2012 (**Chart 1**), compared to growth of 6.0 per cent per annum for Australia's total services exports to the world. Exports of services grew strongly from 1992 to 2008, with exports growing from \$657 million in 1992 to a peak of \$3.8 billion in 2008, with growth averaging 9.6 per cent per annum. The Singapore Australian Free Trade Agreement (SAFTA) came into force during this period (July 2003), which provided enhanced access to Singapore services markets for Australian companies, particularly for financial, legal and other business services.

Exports declined rapidly in 2009 (down 23.4 per cent) and again in 2010 (down a further 11.4 per cent) to \$2.6 billion due to the impact of the Global Financial Crisis (GFC), with Singapore's real GDP declining by 0.8 per cent in 2009, well below its 20 yearly average growth rate of 6.2 per cent (**Chart 2**). The fall in exports was mainly due to large falls in *Transport services*. Service exports to Singapore have partly recovered with rises in 2011 and 2012 to \$3.2 billion, though they are still below their pre-GFC peak.



Australia's imports of services from Singapore increased on average 9.1 per cent per annum over the past 20 years to be valued at \$4.3 billion in 2012. As with exports, imports of services grew strongly from 1992 to 2008 growing from \$866 million to \$4.9 billion in 2008, an average annual increase of 11.2 per cent. The impact of the GFC had a significant impact on imports, with services falling 28.8 per cent to \$3.5 billion in 2009. However imports of services started recovering earlier than exports, with imports growing in all years since 2009 to \$4.3 billion, though this is still below their pre-GFC peak.

Chart 2: Singapore's growth in real gross domestic product

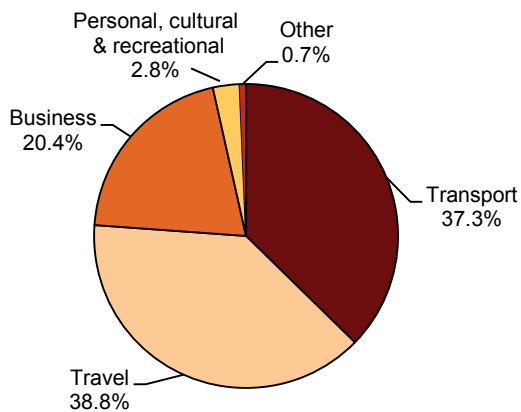


Source: IMF World Economic Outlook database, April 2013.

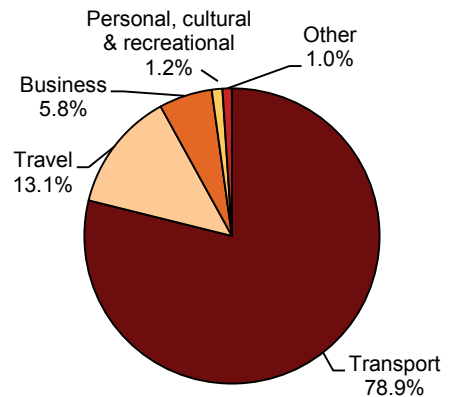
Chart 3: Australia's trade in services with Singapore by major type

2002

Exports

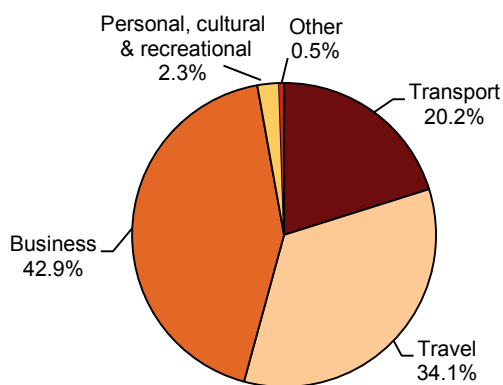


Imports

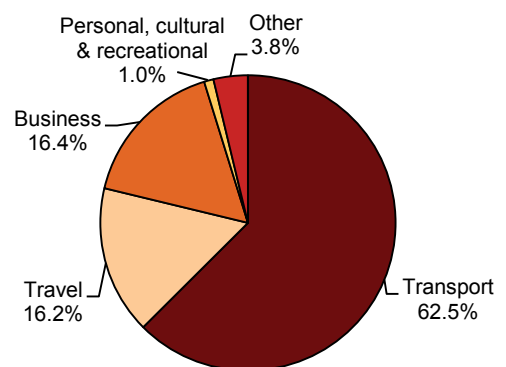


2012

Exports



Imports



Based on ABS catalogue 5368.0.55.004.

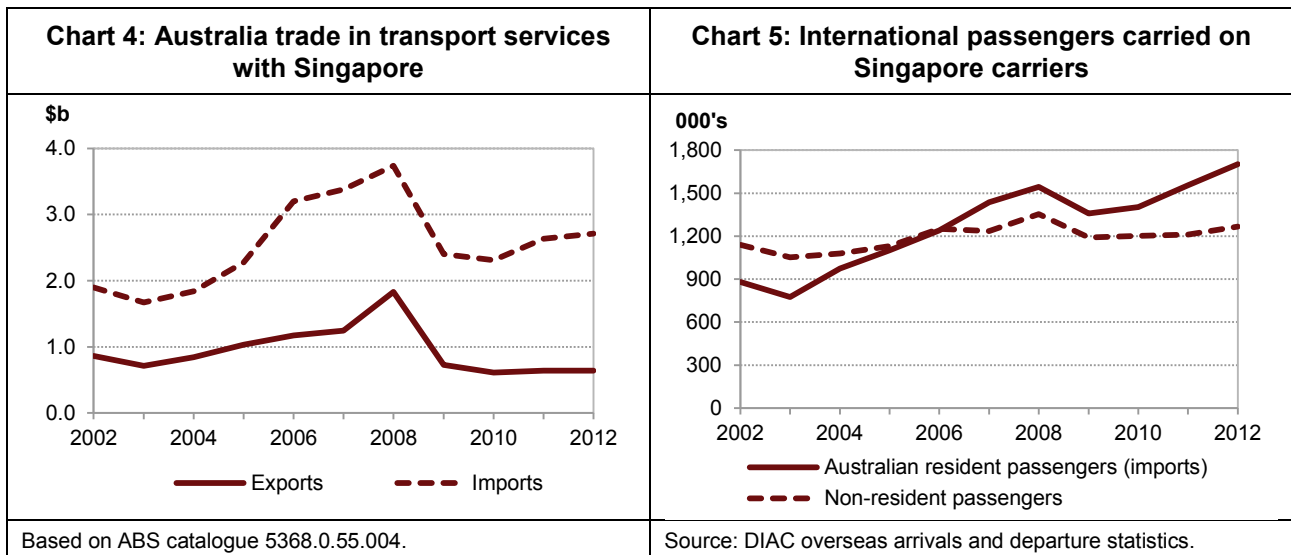
Major services sectors - Overview

Australia's services export profile with Singapore is dominated by *Business services*¹, which accounted for 42.9 per cent of total services exports in 2012. *Travel services* accounted for 34.1 per cent and *Transport services* accounted for 20.2 per cent. The remaining services trade (mainly *Personal, cultural & recreational services, Government services* and *Maintenance & repair services*) accounted for 2.8 per cent of services exports to Singapore. Australia's services profile with Singapore has changed considerably since the entry into force of SAFTA in 2003, when *Travel services* and *Transport services* were the dominant exports (accounting for 38.9 per cent and 37.3 per cent of total services exports respectively) and *Business services* accounted for only 20.4 per cent (**Chart 3**).

Australia's services imports profile with Singapore is dominated by *Transport services*, which accounted for 62.5 per cent of total services imports in 2012 (down from 78.9 per cent in 2002). *Business services* accounted for 16.4 per cent (up from 5.8 per cent in 2002), *Travel services* accounted for 16.2 per cent and *Personal, cultural and recreational services* accounted for 1.0 per cent. The remaining services trade (mainly *Government* and *Maintenance & repair services*) accounted for 3.8 per cent of services imports.

Transport services

Australia's exports of *Transport services* to Singapore decreased on average 2.8 per cent per annum over the past 10 years (**Chart 4**). However, exports of these services grew strongly between 2002 and 2008, up 14.2 per cent per annum to 2008 to be valued at \$1.8 billion. Exports fell sharply during the GFC to \$610 million in 2010. Since then exports of these services have slowly started to recover to be valued at \$640 million in 2012, but are still well below their pre-GFC peak.



The major component of *Transport services* exports to Singapore was *Other transport services*, which includes services that are auxiliary to transport – such as baggage handling, navigation charges, cargo handling services and port and air traffic control. Exports of *Other Transport services* to Singapore grew by 29.8 per cent between 2002 and 2012, from \$255 million to \$331 million and accounted for just over half of total *Transport services* in 2012.

Passenger services exports to Singapore accounted for 27.2 per cent of total *Transport services* in 2012. Exports of *Passenger services* have declined significantly over the past 10 years from \$538 million in 2002 to just \$174 million in 2012, with most of this fall happening between 2009 and 2012.

Postal and courier services accounted for 19.8 per cent of total *Transport services* exports to Singapore and were valued at \$127 million in 2012. These services have grown by 188.6 per cent from \$44 million in 2002.

Freight services exports to Singapore accounted for the remaining share of *Transport services* in 2012. *Freight services* exports have declined over the past 10 years from \$25 million in 2002 to just \$9 million in 2012.

¹ *Business services* includes: *Construction services; Financial & insurance services; Charges for the use of intellectual property nie; Telecommunication, computer & information services; and Other business services.*

Australia's imports of *Transport services* from Singapore (**Chart 4**) rose 4.2 per cent per annum on average over the past 10 years. Imports of these services were valued at \$2.7 billion in 2012 and accounted for 62.5 per cent of Australia's total imports of services. Like exports, imports of *Transport services* grew strongly between 2002 and 2008, growing on average by 15.3 per cent per annum to a record \$3.7 billion, before falling in 2009 and 2010 to \$2.3 billion during the GFC. Imports have since rebounded strongly in 2011 and 2012 but still remain under the pre-GFC peak.

The Australian Bureau of Statistics (ABS) does not publish a full breakdown of *Transport services* imports from Singapore, however *Passenger services* and *Freight services* would be the major components (combined valued at \$2.7 billion, or 98.7 per cent of total *Transport services*). The Department of Immigration and Citizenship (DIAC) overseas arrivals and departure statistics can provide more information on the trends in Australia's *Passenger services* imports from Singapore, however there is no alternative source of data available to analyse *Freight services* imports.

Before analysing the DIAC data it is necessary to understand what the ABS defines as an import of *Passenger services* in Australia's Balance of Payments statistics. Imports are defined as Australian residents flying internationally on Singapore carriers (planes and vessels) to and from Australia (e.g. an Australian flying on Singapore Airlines from the United States to Australia) while non-residents flying internationally on Singapore carriers are not an Australian import (rest of the world transaction).

Chart 5 shows the number of travellers flying on Singapore carriers between Australia and the rest of the world between 2002 and 2012. In 2002, 879,814 Australians travelled on Singapore carriers, – i.e. imports of passenger services. By 2012 the number of Australian travellers on Singapore carriers had increased to 1.7 million (average annual growth of 7.4 per cent). The strong increase in Australians travelling on Singapore carriers would indicate a rise in *Passenger services* imports over the period. The boom in Australians travelling internationally over this period can be attributed to a number of factors, including the strength of the Australian economy and the strong Australian dollar, which has made overseas trips increasingly more affordable².

The ABS does publish data for *Postal and courier services* and *Other transport services* which, combined, accounted for just 1.3 per cent of total *Transport services* imports from Singapore valued at \$2 million and \$33 million respectively in 2012. These services have remained fairly constant over the past 10 years.

Travel services

Australia's exports of *Travel services* to Singapore were valued at \$1.1 billion in 2012 and have increased on average 2.9 per cent per annum over the past 10 years (**Chart 6**). *Travel services* exports accounted for 34.1 per cent of total services exports to Singapore in 2012. Over this period the number of short-term visitor arrivals from Singapore increased from 286,900 in 2002 to 343,600 in 2012 (**Chart 7**).



² The cost of international holiday travel and accommodation component of the ABS Consumer Price Index (CPI) has risen at around a quarter of the rate (7.0 per cent) of the rise in the overall CPI (31.4 per cent) over the period Dec 2002 to Dec 2012 (ABS catalogue 6401.0).

Australia's *Travel services* exports to Singapore in 2012 comprised *Business travel services* valued at \$277 million, *Education-related travel services* valued at \$283 million and *Other personal travel services* (mainly recreational travel) valued at \$522 million. *Business travel* has increased 246.3 per cent since 2002, while *Education-related travel* and *Other personal travel* have both fallen, by 2.4 and 0.6 per cent respectively.

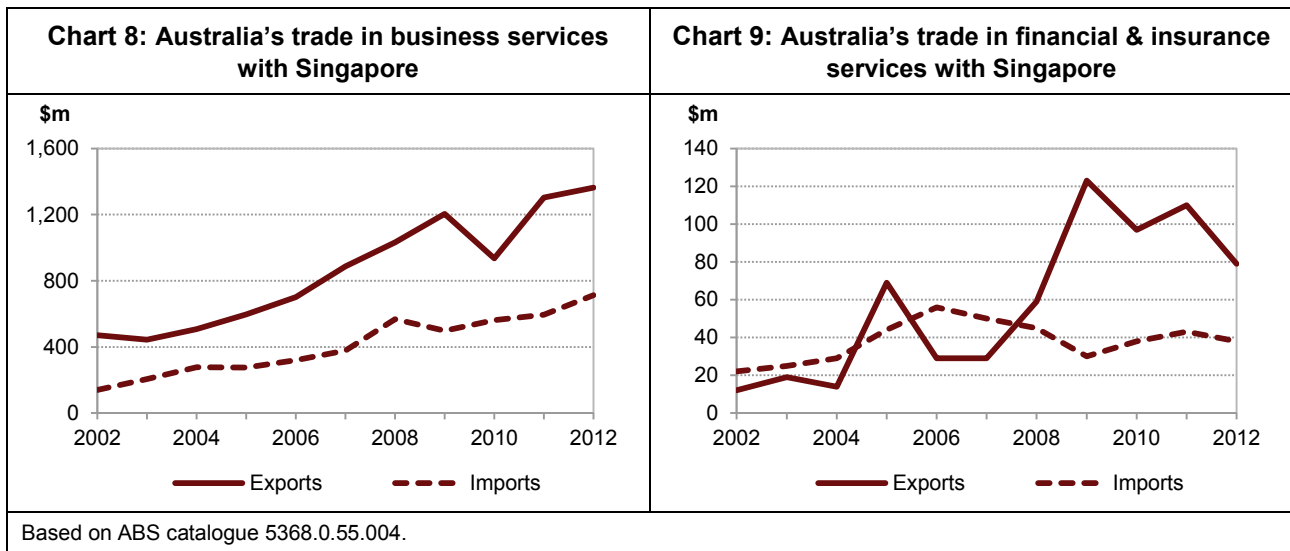
The fall in *Education-related travel services* exports is mainly due to a fall in higher education enrolments, from 12,032 in 2002 to 9,081 in 2012. The fall in these enrolments can be partly attributed to the growth in the number of Australian universities setting up offshore campuses to provide higher education services directly to Singapore residents, with just under 20,000 Singapore-born students studying in Australian offshore campuses in 2011³.

Australia's imports of *Travel services* from Singapore increased by an average of 4.2 per cent per annum over the past 10 years to be valued at \$704 million in 2012 (**Chart 6**). *Travel services* imports accounted for 16.2 per cent of Australia's imports of services from Singapore. Over this period the number of short-term Australian resident departures to Singapore increased from 148,900 to 306,500 in 2012 (**Chart 7**). The ABS data only includes Australian's travelling to Singapore as their final destination. According to Singapore tourism statistics this number is much larger when including Australians who stay in Singapore for a few days on route to another country, with a total of 956,039 visitors coming from Australia in 2011 (2012 data is not yet available) up from 538,408 in 2002.

Australia's *Travel services* imports from Singapore in 2012 comprised *Business travel services* valued at \$192 million, *Education-related travel services* valued at \$34 million and *Other personal travel services* (mainly recreational travel) valued at \$479 million. All categories recorded growth since 2002, with *Business travel* up 66.9 per cent, *Education-related travel* up 30.8 per cent and *Other personal travel services* up 170.6 per cent.

Business services⁴

In 2012, Singapore was both Australia's largest market and source of *Business services* in Asia. Australia's exports of *Business services* to Singapore was valued at \$1.4 billion in 2012 (**Chart 8**) and accounted for 42.9 per cent of total services exports to Singapore, more than double the share of 20.4 per cent in 2002. Exports of *Business services* rose by an average of 12.8 per cent per annum over the past 10 years. Imports of *Business services* from Singapore were valued at \$713 million and accounted for 16.4 per cent of total service imports from Singapore in 2012. Imports of *Business services* have increased by an average of 15.9 per cent per annum over the past 10 years. Within *Business services* the major services were:



Financial and Insurance services

Exports of *Financial and Insurance services* to Singapore increased by an average of 24.5 per cent per annum over the past 10 years to be valued at \$79 million in 2012. **Chart 9** shows that these services rose strongly from 2002 to 2009, up from \$12 million to \$123 million, before falling 35.8 per cent between 2010 and 2012. *Financial services* were valued at \$73 million in 2012 and *Insurance services* were valued at \$6 million. Imports of *Financial*

³ Source: Australian Education International research snapshot – *Transnational education in the higher education sector*, August 2012.

⁴ *Business services* includes: *Construction services*; *Financial & insurance services*; *Charges for the use of intellectual property* nie; *Telecommunication, computer & information services*; and *Other business services*.

and *Insurance services* from Singapore have grown at a slower pace than exports, up from \$22 million to \$38 million in 2012, with *Financial services* valued at \$31 million and *Insurance services* valued at \$7 million.

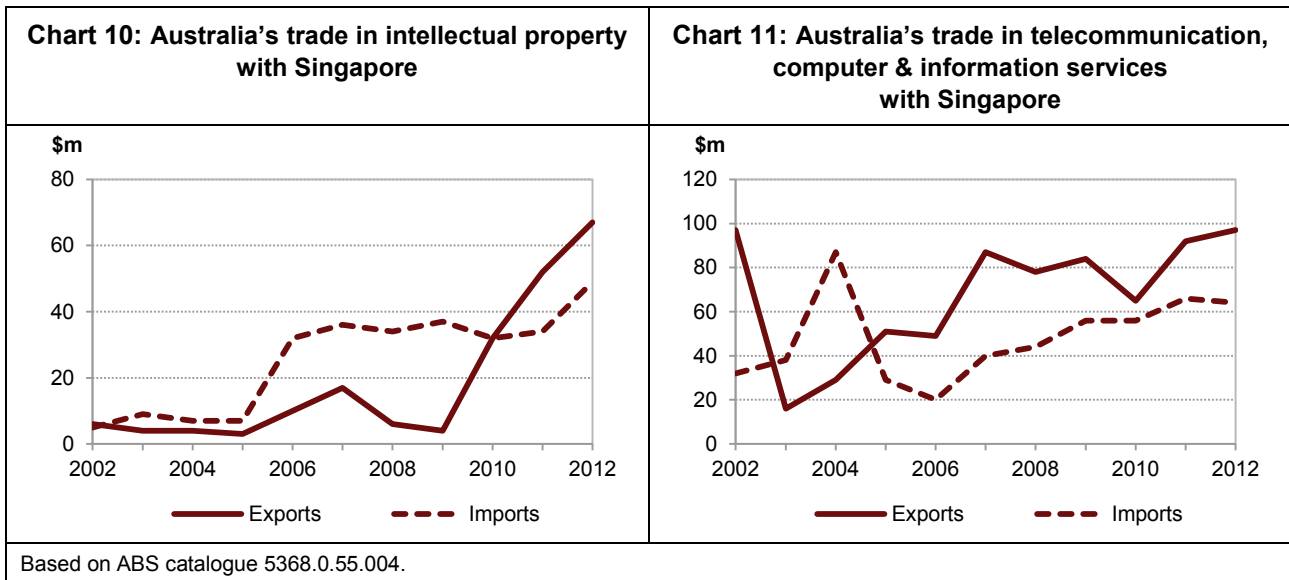
Exporting *Financial* and *Insurance services* is not the dominant means by which Australia provides these services to Singapore. A one-off survey by the ABS found that 87.3 per cent of these services were provided by Australia's foreign financial and insurance affiliates abroad in 2009-10 (refer to the section below on Australia's foreign affiliates services trade with Singapore for more information).

Charges for the use of intellectual property (or royalties)

Australia's exports of *Intellectual property* to Singapore have grown by an average 29.7 per cent per annum from \$6 million in 2002 to \$67 million in 2012 (**Chart 10**). Australia's imports of *Intellectual property* from Singapore have grown by an average of 25.2 per cent per annum over the past 10 years from \$5 million in 2002 to \$49 million in 2012.

Telecommunication, computer & information services

Australia's exports of *Telecommunication, computer & information services* to Singapore were valued at \$97 million in both 2002 and 2012 (**Chart 11**). However, *Telecommunication services* have fallen from \$87 million in 2002 to just \$5 million in 2012 (mainly due to a fall in *Telephone services*). *Computer & information services* however increased from \$9 million in 2002 to \$93 million in 2012. The major export within *Computer & information services* was exports of *Hardware & software consultancy services*.



Australia's imports of *Telecommunication, computer & information services* from Singapore have risen by an average 6.0 per cent over the past 10 years from \$32 million in 2002 to \$64 million in 2012. As with exports, imports of *Telecommunication services* have fallen from \$22 million in 2002 to just \$9 million in 2012 (mainly due to a fall in *Telephone services*). *Computer & information services* imports however increased from \$10 million in 2002 to \$55 million in 2012. The major import within *Computer & information services* was imports of *Hardware & software consultancy services* valued at \$34 million in 2012.

Research & development services

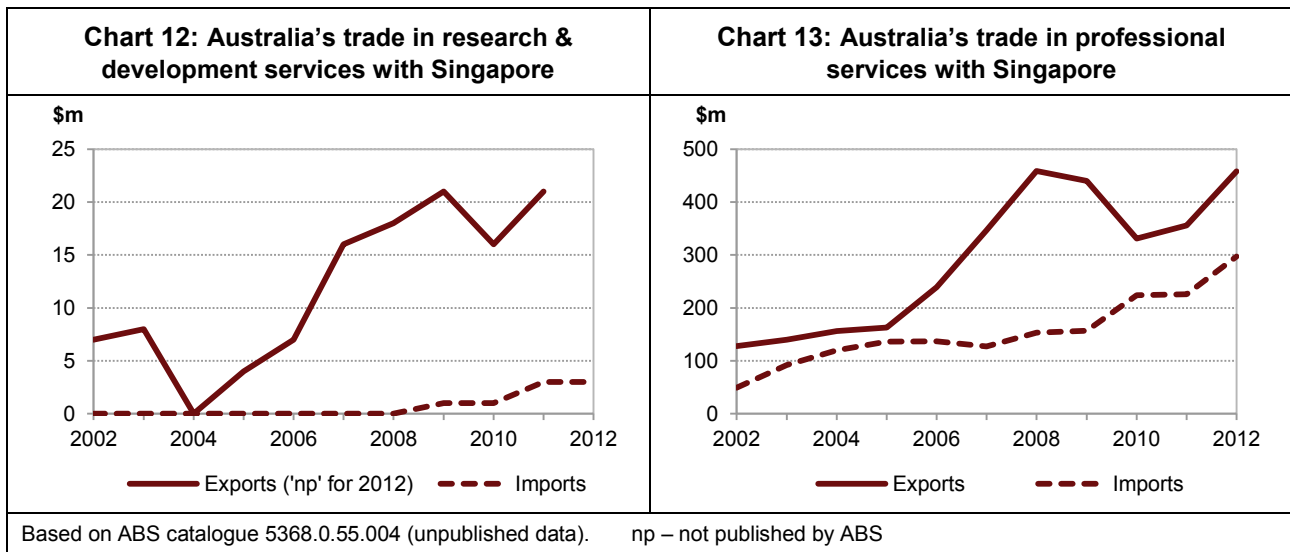
Australia exported around \$20 million⁵ worth of *Research & development services* to Singapore (**Chart 12**) while imports were valued at just \$3 million. Exports of these services have grown from \$7 million in 2002.

Professional & management consulting services

Australia's exports of *Professional services* to Singapore have grown by an average of 14.6 per cent per annum over the past 10 years (**Chart 13**). Growth was recorded between 2002 and 2008 with exports increasing from \$128 million to \$459 million. During the GFC, exports fell back to \$331 million in 2010, before recovering to \$458 million in 2012. The major *Professional services* exports to Singapore in 2012 were *Management fees* valued

⁵ Exports of *Research & development services* to Singapore in 2012 were not published by the ABS however Australia exported around \$20 million per year in these services over the period 2008 to 2011.

at \$214 million, *Accounting, auditing, bookkeeping & tax consulting services* valued at \$53 million, *Other professional services* valued at \$41 million and *Legal services* valued at \$31 million.

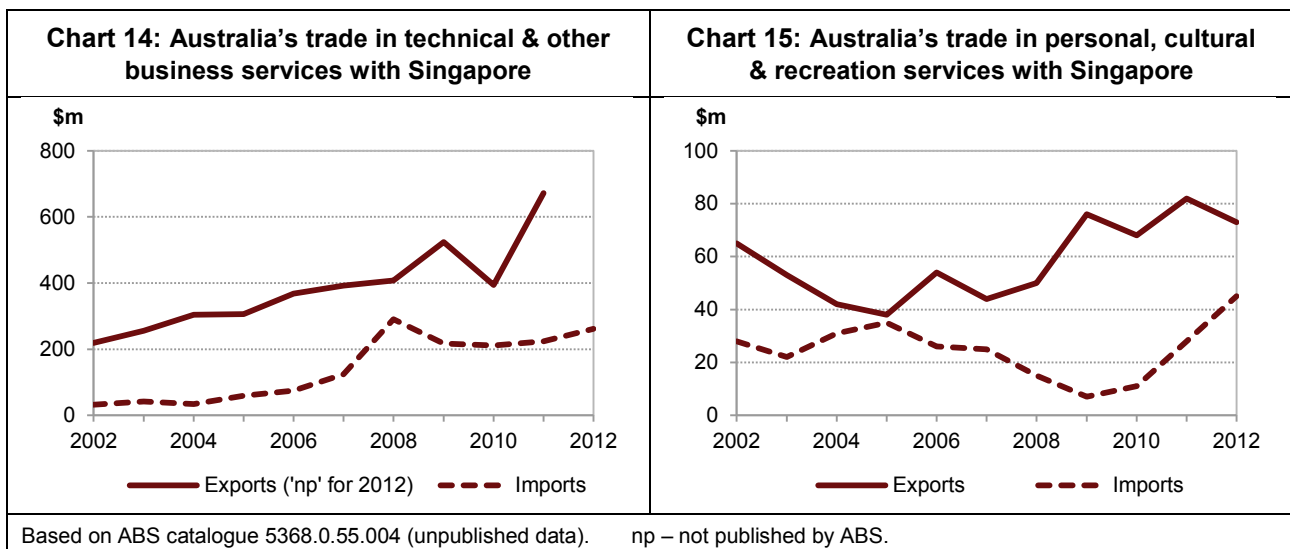


Imports of *Professional services* from Singapore have grown on average by 14.5 per cent per annum over the past 10 years from \$49 million in 2002 to \$297 million in 2012. The major *Professional services* imports from Singapore in 2012 were *Management fees* valued at \$217 million, and *Other professional services* valued at \$17 million.

The strong growth in both exports and imports of *Management fees* over the period has been driven by the increase in the two-way direct investment relationship between Australian and Singapore which has risen from levels of investment of just \$6.0 billion in 2002 to \$34.7 billion in 2012.

Technical, trade-related & other business services

Australia's exports of *Technical & other business services* to Singapore (**Chart 14**) have increased from \$219 million in 2002 to over \$600 million in 2012⁶. The ABS does not publish any further breakdown of this component for recent years. In the past years the major components were *Trade-related commission services*, *On-site processing services* and *Engineering services*.



⁶ Exports of *Technical & other business services* were not published by the ABS in 2012. The value of the not published items for the **Other business services** category was around \$662 million in 2012 and included *Research & development services* and *Technical & other business services*. In recent years *Research & development services* were valued at around \$20 million and *Technical & other business services* between \$450 million to \$650 million. This indicates that exports for this item were most likely in the order of \$600+ million for 2012.

Imports of *Technical & other business services* from Singapore have increased from \$32 million in 2002 to \$262 million in 2012, an average growth rate of 27.4 per cent per annum. The largest component was *Engineering services* valued at \$129 million in 2012, up from just \$1 million in 2002.

Personal, cultural & recreation services

Exports of *Personal, cultural & recreation services* to Singapore (**Chart 15**) was valued at \$73 million in 2012, and have been increasing at an average of 4.7 per cent per annum since 2002. *Film, TV & related royalties* were valued at \$5 million in 2012 while *Other personal, cultural & recreation services* (mainly *Education services provided through educational institutions*) were valued at \$68 million.

Imports of *Personal, cultural & recreation services* from Singapore were valued at \$45 million in 2012, up from \$28 million in 2002. *Film TV & related royalties* were valued at \$29 million in 2012 (mainly TV royalties). Other major imports of *Personal, cultural & recreation services* from Singapore included *Education services provided through educational institutions* valued at \$15 million.

Foreign affiliates trade in services with Singapore

The World Trade Organization (WTO) General Agreement on Trade in Services (GATS) identifies four “modes of supply” (including trade in services by foreign affiliates) for determining a country’s delivery of services to the world to facilitate classification and analysis of barriers to services trade. The modes of supply framework was developed as barriers to services trade typically arise as regulatory barriers within the host economy and not as traditional tariff barriers as for merchandise goods.

The four modes of service supply are defined as:

- *Mode 1 – Cross border supply* – occurs when a service is delivered from a supplier in their country of residence to a consumer in another country, without either supplier or consumer moving into the country of the other.
- *Mode 2 – Consumption abroad* – occurs when consumers resident in their country move outside their home territory and consume services in another country, such as tourist activities.
- *Mode 3 – Commercial presence* (i.e. foreign affiliates trade) – occurs when a commercial presence abroad is established as a result of direct investment in the host country (i.e. a foreign affiliate is established) to supply services to consumers in their country of residence (i.e. local sales and purchases only)⁷. For example if an Australian university sets up an offshore campus in Singapore to provide education services to Singapore residents, or an Australian bank sets up a branch office in Singapore to provide financial services.
- *Mode 4 – Presence of natural persons* – occurs when an individual has moved into the territory of the consumer to provide a service without becoming a resident of that country⁸.

GATS Modes 1, 2 and 4 are recorded as exports and imports in Australia’s balance of payments and national accounts statistics. Mode 3, however is not currently measured by the ABS. Available information about this mode of supply indicates it has a key role in Australia’s international provision and purchases of services.

Outwards foreign affiliates trade

A one-off study of Australia’s outward foreign affiliates trade conducted by the ABS estimated that in 2002-03, 64.6 per cent of Australia’s services provided abroad were delivered by commercial presence or GATS Mode 3⁹.

The study found that Australia’s proportion of services provided by its affiliates (Mode 3) to Singapore was valued at \$2.5 billion and accounted for 53.1 per cent of all Australian services provided to Singapore in 2002-03. Commercial presence was the dominant means of supply for the sale of Australian services to Singapore.

Though the ABS has not updated its 2002-03 study on Australia’s outward foreign affiliates trade, the latest ABS data on Australian investment in Singapore shows that this activity is still extremely significant, with the stock of Australian direct investment in Singapore abroad valued at \$10.8 billion at the end of December 2012, up from \$2.3 billion in 2002.

⁷ Exports and imports of Australian foreign affiliates to another country are not included as they would be picked up in the trade account of that country’s balance of payments statistics.

⁸ Mode 4 should include wages and salaries of employees of Australian businesses who provide the service abroad. However, wages and salaries of employees are not included in services trade in balance of payments statistics but are recorded in the income account of the balance of payments under the item *compensation of employees*.

⁹ ABS catalogue 5495.0, *Australia’s Outwards Foreign Affiliates Trade, 2002-03* and DFAT’s *Trade in Services, Australia, 2003-04* – feature article *Australia’s Outwards Foreign Affiliates Trade, 2002-03*.

Two more recent studies show that the level of Australian foreign affiliate activity with Singapore can vary significantly between service sectors.

Legal services

The latest study on Australia’s legal services markets conducted by the International Legal Services Advisory Council (ILSAC) for 2008-09¹⁰ found that Australia’s provision of legal services to Singapore was valued at \$41.0 million in 2008-09 (**Table A**). Services exported directly from Australia (Mode 1 – cross border supply) accounted for 39.8 per cent (\$16.3 million) of the total provision of *Legal services* to Singapore, while 32.9 per cent (\$13.5 million) were provided by Australians temporarily travelling to Singapore to provide legal services (Mode 4 - presence of natural persons). The provision of legal services to Singapore persons in Australia (Mode 2 – consumption abroad) accounted for 7.3 per cent (\$3.0 million). Legal services provided to Singapore via an Australian foreign affiliate based in Singapore (Mode 3 – or commercial presence) was valued at \$8.2 million in 2008-09 and accounted for only 20.0 per cent of the total provision of *Legal services* to Singapore in 2008-09.

For more information on the [ILSAC survey](#) please refer to their website.

Year	GATS modes of supply				Total \$m
	Mode 1 \$m	Mode 2 \$m	Mode 3 \$m	Mode 4 \$m	
2004-05	12.1	(a)(b)	10.0	9.6	31.6
2006-07	12.6	(a)(b)	14.4	8.0	35.1
2008-09	16.3	3.0	8.2	13.5	41.0

(a) For 2004-05 & 2006-07 Mode 1 also includes Mode 2.
 (b) For 2004-05 & 2006-07 Mode 1 also includes some legal services provided by Australian resident legal practice to an Australian company (with the work originating from an overseas based project). These transactions are not exports in ABS trade in services statistics.

Source: ILSAC Survey of Australian Export Market for Legal Services.

Financial and Insurance services

The Department of Foreign Affairs and Trade (DFAT) commissioned the ABS to conduct a new survey of outward foreign affiliates trade in services for the reference period 2009-10. The survey covered the finance and insurance sector only, having been identified in the previous survey as one of the key sectors for Australia’s outwards foreign affiliates trade in services.

The survey found that Australia’s 57 finance and insurance affiliates located in Singapore had total sales of *Financial and insurance services* valued at \$1.0 billion¹¹, of which GATS Mode 3 – commercial presence (or local sales in Singapore) were valued at \$658 million and sales to third party countries were valued at \$377 million.

The survey found that commercial presence was critical in the provision of Australian *Financial and insurance services* in Singapore with 87.3 per cent of all these services provided to Singapore being delivered by Australian foreign affiliates, comprising \$356 million in sales of *Financial services* and \$302 million in *Insurance services*.

For more information on this survey please refer to DFAT’s article [Australia’s Outward Finance and Insurance Foreign Affiliates Trade in Services 2009-10](#).

Inwards foreign affiliates trade

No recent studies have been conducted for Australian inward foreign affiliates trade from Singapore. However given the significant value of Singapore direct investment in Australia, valued at \$23.8 billion at the end of

¹⁰ International Legal Services Advisory Council - *Survey of Australian Export Market for Legal Services, 2008-09*.

¹¹ Includes explicit financial fees only. The ABS did not calculate a regional split of implicit financial services.

December 2012, inwards foreign affiliates trade would also be significant for the provision of Singapore services to Australia.

Conclusion

Singapore is Australia's fourth most important trade in services partner (and second largest in Asia after China). Two-way trade in services grew steadily from \$1.5 billion in 1992 to \$8.7 billion in 2008. Trade declined during the GFC, but has since recovered to \$7.5 billion in 2012 (up 22.7 per cent from its low in 2010 of \$6.1 billion).

Australia's services exports profile has evolved over this period, with *Business services* now accounting for over 40 per cent of Australia's total services exports to Singapore. In terms of imports, *Transport services* remained the most important sector.

The full extent of Australia's trade in services relationship with Singapore is currently not measured in official ABS trade in services statistics. Studies have found that services delivered by Australian affiliates in Singapore and Singapore affiliates in Australia are a key mode for the provision and purchases of services between Australia and Singapore.

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AUSTRALIA'S SERVICES EXPORTS TO SINGAPORE
BY TYPE OF ACTIVITY (a)
(A\$ million)

Services - Type of activity	2002	2005	2008	2011	2012
Manufacturing services on physical inputs owned by others	0	0	0	0	0
Maintenance & repair services nie	2	2	1	0	2
Transport services	862	1,030	1,832	638	640
<i>Passenger (b)</i>	538	np	np	179	174
<i>Freight</i>	25	np	np	17	9
<i>Other transport</i>	255	np	np	305	331
<i>Postal & courier (c)</i>	44	np	np	138	127
Travel services	896	773	869	1,089	1,083
<i>Business</i>	80	103	169	254	277
<i>Personal</i>	815	670	699	835	805
Education-related	290	271	269	286	283
Other personal travel (d)	525	399	430	549	522
Construction services	0	0	6	0	0
Insurance & pension services	3	4	5	5	6
<i>Direct insurance</i>	3	3	4	5	5
Freight	3	3	4	5	5
Life	0	0	0	0	0
Other direct	0	0	0	0	0
<i>Reinsurance</i>	0	0	0	0	0
<i>Auxiliary</i>	0	0	0	0	0
<i>Pension</i>	1	1	1	1	1
<i>Standardised guarantee</i>	0	0	0	0	0
Financial services	9	65	54	105	73
Charges for the use of intellectual property nie	6	3	6	52	67
<i>Licences to reproduce and/or distribute computer services</i>	1	1	4	3	2
Computer software	1	1	4	2	2
Computer hardware & design	0	0	0	0	0
<i>Licences to produce and/or distribute audiovisual & related services</i>	0	0	0	0	0
<i>Outcomes of research & development</i>	0	0	0	43	np
<i>Franchise & trademarks licensing fees</i>	1	0	0	0	0
<i>Other charges</i>	4	2	1	6	np
Royalties on education services	3	1	0	4	np
Royalties on telecommunication services	0	0	0	0	0
Music	0	0	0	0	0
Other charges	1	0	1	3	np
Telecommunications, computer & information services	97	51	78	92	97
<i>Telecommunication</i>	87	37	7	4	5
Telephone	87	28	6	3	3
Other telecommunication	0	9	2	1	2
<i>Computer & information</i>	9	14	71	88	93
Computer	9	13	71	60	np
Hardware & software consultancy	8	10	67	51	np
Data processing	1	3	4	9	np

AUSTRALIA'S SERVICES EXPORTS TO SINGAPORE
BY TYPE OF ACTIVITY (a) (cont'd)
(A\$ million)

Services - Type of activity	2002	2005	2008	2011	2012
Information services	0	0	0	0	1
Database services	0	0	0	0	0
Newsagency subscription	0	0	0	0	1
Other computer & information	0	1	0	28	np
Other business services	355	473	884	1,050	1,120
<i>Research & development</i>	7	4	18	21	np
<i>Professional & management consulting</i>	128	163	459	356	458
Legal, accounting, management consulting, public relations & other professional services	114	154	441	295	347
Legal	0	0	20	38	31
Accounting, auditing, bookkeeping & tax consulting	1	2	23	31	53
Business & management consultancy and public relations	12	57	186	82	8
Other professional	14	9	36	58	41
Management fees nie	87	86	176	86	214
Advertising, market research & public opinion polling	15	9	18	62	112
<i>Technical, trade-related & other business</i>	219	306	408	672	np
Architectural, engineering, scientific & other technical services	21	7	32	37	np
Architectural	3	1	3	3	0
Engineering	1	1	23	25	np
Surveying	np	np	4	3	np
Scientific & other technical	np	np	2	7	np
Waste treatment & de-pollution, agricultural & mining	41	100	np	np	np
Waste treatment & depollution	0	0	0	0	0
Services incidental to agriculture, forestry & fishing	0	1	0	0	0
Services incidental to mining, and oil & gas extraction	0	0	0	0	np
Other on-site processing	41	100	np	np	0
Operational leasing	0	0	np	2	np
Air operational leasing	0	0	0	0	0
Sea operational leasing	0	0	np	2	np
Other operational leasing	0	0	0	0	0
Trade-related commission services	152	195	np	np	np
Other business services nie	5	3	np	np	np
Total Business services (e)	470	596	1,033	1,304	1,363
Personal, cultural & recreational services	65	38	50	82	73
<i>Audiovisual & related services</i>	3	1	1	24	5
Royalties on film, television, home entertainment & other audiovisual	0	0	1	24	5
Film	0	0	0	0	0
Television	0	0	0	0	0
Home entertainment	0	0	0	0	0
Other audiovisual-related royalties	0	0	0	0	0
Other film, TV and multimedia royalties	0	0	1	24	5
Audiovisual nie	3	1	0	0	0

AUSTRALIA'S SERVICES EXPORTS TO SINGAPORE
BY TYPE OF ACTIVITY (a) (cont'd)
(A\$ million)

Services - Type of activity	2002	2005	2008	2011	2012
<i>Other personal, cultural & recreational services</i>	62	38	49	58	68
Health	0	0	0	0	0
Education	61	38	49	56	68
Consultancy	8	7	2	1	2
Correspondence courses	5	0	5	5	4
Services through educational institutions	47	29	40	46	60
Other educational services	1	1	3	5	3
Other recreational	2	0	0	2	0
Sporting & entertainment	0	0	0	1	0
Off-shore gambling	2	0	0	0	0
Other recreational nie	0	0	0	2	0
Government services nie	14	21	14	14	14
Total Services	2,309	2,460	3,799	3,128	3,176

(a) Cells in this table may have been perturbed to protect confidentiality. (b) *Passenger services* includes *Agency fees* and *Commissions for air transport*. (c) *Postal & courier services* includes *Indirect sea transport*. (d) *Other personal travel* includes *Health-related travel services*. (e) *Business services* includes: *Construction services*; *Financial & insurance services*; *Charges for the use of intellectual property nie*; *Telecommunication, computer & information services* and *Other business services*.

np –not published

Source: ABS catalogue 5368.0.55.004 (unpublished data).

AUSTRALIA'S SERVICES IMPORTS FROM SINGAPORE
BY TYPE OF ACTIVITY (a)
(A\$ million)

Services - Type of activity	2002	2005	2008	2011	2012
Manufacturing services on physical inputs owned by others	0	0	0	0	0
Maintenance & repair services nie	19	7	7	79	155
Transport services	1,900	2,278	3,737	2,635	2,712
<i>Passenger (b)</i>	np	np	np	np	np
<i>Freight</i>	np	np	np	np	np
<i>Other transport</i>	22	22	32	33	33
<i>Postal & courier (c)</i>	4	4	0	0	2
Travel services	316	382	530	668	704
<i>Business</i>	113	123	141	193	192
<i>Personal</i>	203	260	390	475	513
Education-related	26	28	29	43	34
Other personal travel (d)	177	232	361	432	479
Construction services	0	0	0	0	0
Insurance & pension services	3	6	10	7	7
<i>Direct insurance</i>	3	6	10	7	7
Freight	3	6	10	7	7
Life	0	0	0	0	0
Other direct	0	0	0	0	0
<i>Reinsurance</i>	0	0	0	0	0
<i>Auxiliary</i>	0	0	0	0	0
<i>Pension</i>	0	0	0	0	0
<i>Standardised guarantee</i>	0	0	0	0	0
Financial services	19	38	35	36	31
Charges for the use of intellectual property nie	5	7	34	34	49
<i>Licences to reproduce and/or distribute computer services</i>	3	3	8	6	10
Computer software	3	3	7	6	10
Computer hardware & design	0	0	2	0	0
<i>Licences to produce and/or distribute audiovisual & related services</i>	0	0	0	0	0
<i>Outcomes of research & development</i>	np	0	np	np	np
<i>Franchise & trademarks licensing fees</i>	np	0	np	np	np
<i>Other charges</i>	np	4	np	np	np
Royalties on education services	np	3	np	0	0
Royalties on telecommunication services	0	0	0	0	0
Music	0	0	0	0	0
Other charges	np	1	np	np	np
Telecommunications, computer & information services	32	29	44	66	64
<i>Telecommunication</i>	22	8	15	10	9
Telephone	19	4	11	4	4
Other telecommunication	3	4	4	7	6
<i>Computer & information</i>	10	21	30	56	55
Computer	9	19	26	48	48
Hardware & software consultancy	9	18	21	33	34
Data processing	0	1	5	15	14

AUSTRALIA'S SERVICES IMPORTS FROM SINGAPORE
BY TYPE OF ACTIVITY (a) (cont'd)
(A\$ million)

Services - Type of activity	2002	2005	2008	2011	2012
Information services	0	0	1	3	4
Database services	0	0	1	0	0
Newsagency subscription	0	0	1	3	4
Other computer & information	2	2	3	4	3
Other business services	81	195	444	452	562
<i>Research & development</i>	0	0	0	3	3
<i>Professional & management consulting</i>	49	136	153	226	297
Legal, accounting, management consulting, public relations & other professional services	48	135	145	214	265
Legal	0	0	3	4	6
Accounting, auditing, bookkeeping & tax consulting	1	3	5	9	12
Business & management consultancy and public relations	2	1	8	2	14
Other professional	1	9	19	12	17
Management fees nie	44	122	111	188	217
Advertising, market research & public opinion polling	1	2	8	11	31
<i>Technical, trade-related & other business</i>	32	59	291	224	262
Architectural, engineering, scientific & other technical services	8	20	123	130	138
Architectural	0	0	0	0	0
Engineering	1	20	117	122	129
Surveying	1	0	4	6	5
Scientific & other technical	6	0	2	3	4
Waste treatment & de-pollution, agricultural & mining	3	2	24	0	6
Waste treatment & depollution	0	0	0	0	0
Services incidental to agriculture, forestry & fishing	0	0	0	0	0
Services incidental to mining, and oil & gas extraction	0	2	5	0	6
Other on-site processing	3	0	20	0	0
Operational leasing	4	22	59	16	16
Air operational leasing	2	4	12	5	5
Sea operational leasing	0	18	42	11	10
Other operational leasing	2	0	6	1	2
Trade-related commission services	9	12	20	9	3
Other business services nie	8	4	64	68	100
Total Business services (e)	140	275	567	595	713
Personal, cultural & recreational services	28	35	15	28	45
<i>Audiovisual & related services</i>	np	np	np	14	29
Royalties on film, television, home entertainment & other audiovisual	np	np	np	14	29
Film	0	0	0	0	0
Television	np	np	np	14	29
Home entertainment	0	0	0	0	0
Other audiovisual-related royalties	0	0	0	0	0
Other film, TV and multimedia royalties	0	0	0	0	0
Audiovisual nie	0	0	np	0	0

AUSTRALIA'S SERVICES IMPORTS FROM SINGAPORE
BY TYPE OF ACTIVITY (a) (cont'd)
(A\$ million)

Services - Type of activity	2002	2005	2008	2011	2012
<i>Other personal, cultural & recreational services</i>	np	np	np	15	16
Health	0	0	0	0	0
Education	np	np	np	7	16
Consultancy	np	np	np	0	1
Correspondence courses	0	0	0	0	0
Services through educational institutions	np	np	np	6	15
Other educational services	0	0	np	1	1
Other recreational	0	0	0	8	0
Sporting & entertainment	0	0	0	7	0
Off-shore gambling	0	0	0	0	0
Other recreational nie	0	0	0	0	0
Government services nie	6	7	8	8	8
Total Services	2,409	2,985	4,864	4,013	4,337

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