

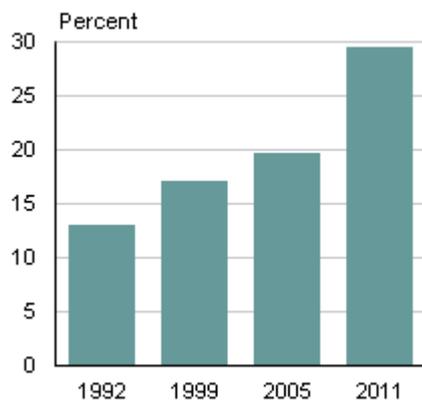
Census of International Trade in Services and Royalties: Year ended June 2011

Embargoed until 10:45am – 22 February 2012

Key facts

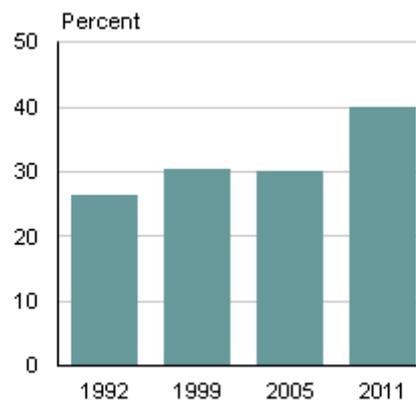
- Exports of commercial services were \$3,992 million for the year ended June 2011 – 29.6 percent of total service exports (up from 19.8 percent in 2005).
- Imports of commercial services were \$5,764 million for the year ended June 2011 – 39.8 percent of total service imports (up from 30.3 percent in 2005).
- Australia remained New Zealand's top trading partner – with 36.3 percent of commercial service exports and 40.1 percent of imports.
- 85.8 percent of New Zealand's commercial service exports were provided to overseas customers by the Internet, email, or phone.

Proportion of commercial services exports to total service exports
Year ended June



Source: StatisticsNewZealand

Proportion of commercial services imports to total service imports
Year ended June



Source: StatisticsNewZealand

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22 February 2012
ISBN 978-0-478-37753

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Commentary

- Overview – census results provide a picture of New Zealand's international service sector
- Globalisation contributes to the rise in commercial services
- Exports of most services increase
- Imports of services increase
- Companies pay \$44 million to have goods manufactured abroad
- Australia, United States, and the United Kingdom remain New Zealand's key trading partners in commercial services
- Exports led by information and technology, imports spread across industries
- Most common way to export services was by the Internet, email or phone

Overview – census results provide a picture of New Zealand's international service sector

The results of the Census of International Trade in Services and Royalties provide an accurate picture of imports and exports of commercial services by New Zealand companies. Statistics New Zealand ran the last Census of International Trade in Services and Royalties in 2005. In this release, results from the year ended June 2011 Census are compared with results from the year ended June 2005 Census.

Revisions to the quarterly balance of payments for the *Balance of Payments and International Investment Position: June 2012 quarter* release will incorporate the census results. This will be published on 21 September 2012, with revisions back to the September 2005 quarter.

Globalisation contributes to the rise in commercial services

Exports of commercial services accounted for 29.6 percent of New Zealand's total service exports in 2011, compared with 19.8 percent in 2005. Exports of commercial services have steadily increased each census year (from 13.1 percent in 1992).

Imports of commercial services accounted for 39.8 percent of New Zealand's total service imports, compared with 30.3 percent in 2005. Imports of commercial services have increased from 26.5 percent of total services in 1992.

One driver of the increase in trade of commercial services was management fees between related parties. New Zealand companies supplied \$512 million of services to their subsidiaries abroad. New Zealand companies also paid \$1,156 million in management fees to their foreign owners – an \$821 million increase since 2005.

Management fees between related parties include charges for managerial and administrative services, and charges for accounting, computer services, and royalties. These are often invoiced collectively and cannot be separated by some survey respondents. As a result, imports and exports of management fees cover a range of business services.

The growth of management fees reflects the increasing presence of New Zealand companies abroad, and foreign companies in New Zealand.

Exports of most services increase

Compared with 2005, exports of most service types rose in 2011. Exports of computer services, management fees, and royalties had the most significant rises.

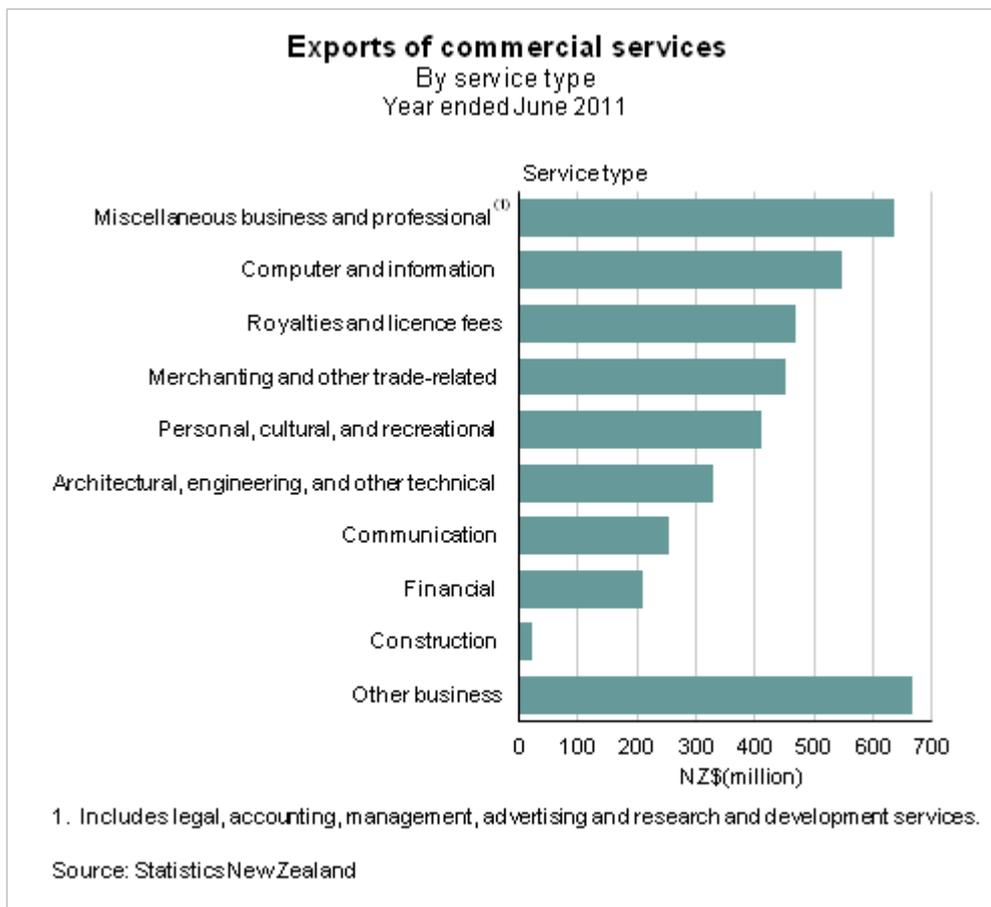
Revenue from information technology up

New Zealand companies provided \$482 million of computer services to foreign customers during 2011, up \$230 million from 2005. New Zealand companies designing software and providing technical support for overseas clients were the largest contributor.

New Zealand companies also received \$186 million in software royalties from abroad, up \$116 million from 2005.

Revenue from movie and television production increases

New Zealand companies provided \$272 million of audio visual services to foreign customers. This was driven by the production of movies and television series in New Zealand.



Imports of services increase

Imports of most service types rose when compared with 2005. Imports of management fees, computer services, and engineering had the most significant rises. Imports of communication and research and development services fell.

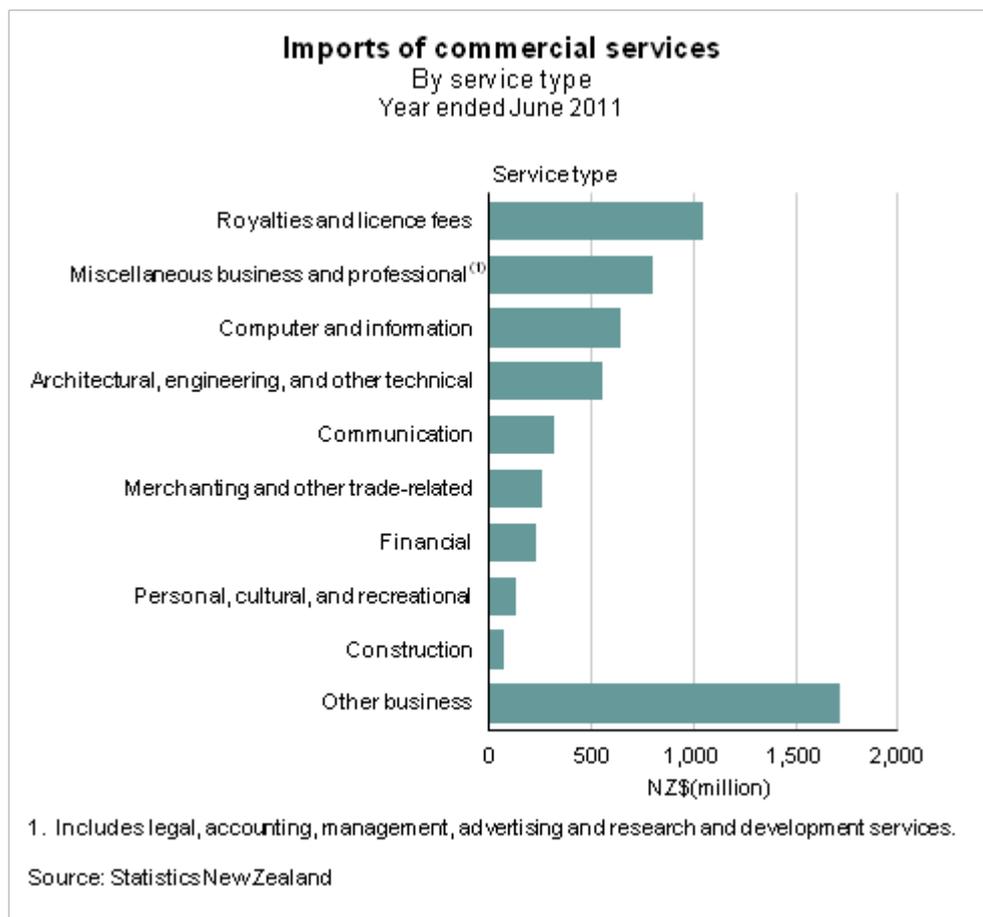
Imports of information technology services up

New Zealand companies paid \$576 million for computer services supplied by foreign companies in 2011, up \$295 million from 2005. Computer services accounted for 10.0 percent of total commercial service imports. This percentage has been increasing steadily from 4.5 percent in 1992. New Zealand companies also paid \$251 million in royalties for the use of foreign software.

Royalty payments to non-residents for broadcast rights, brand names, and franchise rights were \$796 million in 2011, up \$189 million from 2005.

Offshore oil drilling increases service imports

New Zealand companies paid \$552 million for architectural, engineering, and other technical services provided by foreign companies in 2011, up \$391 million from 2005. Companies using overseas expertise for oil exploration and extraction drove this increase. The New Zealand oil industry has grown since 2005, with the Pohokura, Tui, Maari, and Kupe oilfields all beginning production during this period.



Companies pay \$44 million to have goods manufactured abroad

New Zealand companies paid \$44 million in contract manufacturing fees to overseas companies and received \$12 million in contract manufacturing fees. Statistics NZ collected data on these services for the first time in the 2011 Census of International Trade in Services and Royalties.

Australia, United States, and the United Kingdom remain New Zealand's key trading partners in commercial services

Exports to Australia, the United States, and the United Kingdom represented 64.2 percent of total commercial exports in 2011, compared with 63.4 percent in 2005. Imports from Australia, the United States, and the United Kingdom represented 66.4 percent of total commercial imports in 2011, compared with 69.6 percent in 2005.

Australia remains New Zealand's top service trading partner

Australia remained New Zealand's top trading partner for commercial services for the year ended June 2011.

Exports to Australia were \$1,449 million. The main components were:

- management fees to related parties of \$224 million
- computer services of \$192 million
- royalties of \$169 million.

Imports from Australia were \$2,313 million. The main components were:

- management fees to related parties of \$627 million
- computer services of \$370 million
- royalties of \$265 million.

Exports of commercial services to Australia as a percentage of total commercial services have increased steadily each census year, from 23.2 percent in 1992 to 36.3 percent in 2011. Likewise, imports from Australia have increased from 24.7 percent to 40.1 percent.

The trade in commercial services between New Zealand and Australia complements Australia's position as our most significant goods trade and investment partner. Many New Zealand companies have subsidiaries or branches in Australia, and there are many subsidiaries or branches of Australian companies in New Zealand. Once this direct investment relationship is established, there is often trade in services between related enterprises.

Exports to the United States driven by motion pictures and television

The United States remained our second-most significant commercial services trading partner. Exports to the US were \$867 million during 2011.

Exports were driven by personal, cultural, and recreational services of \$228 million. This includes revenue received for the production of motion pictures and television in New Zealand.

Imports from Asia on the rise

Imports of commercial services from Singapore and China represented 8.1 percent of total commercial service imports, up from 2.9 percent in 2005. This was driven by an increase in engineering services associated with offshore oil drilling and extraction.

Imports of commercial services from India represented 1.2 percent of total commercial service imports, compared with 0.3 percent in 2005. This was driven by a rise in management fees, and information technology consulting and support services.

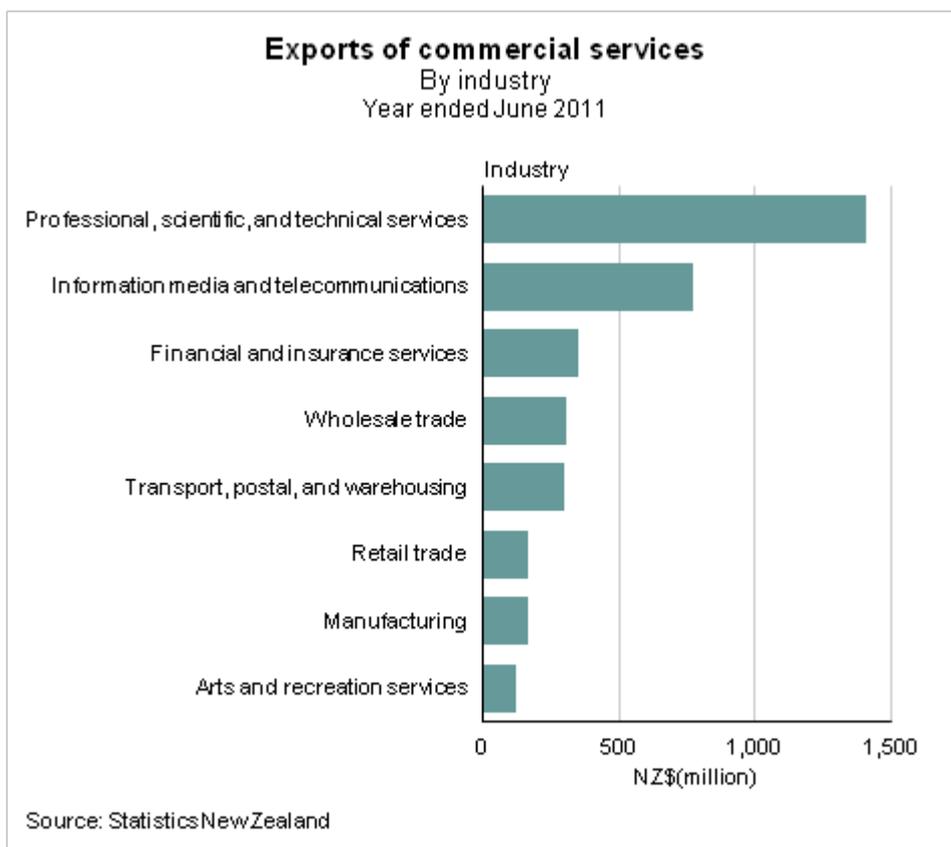
Exports led by information and technology; imports spread across industries

Table 7 in the downloadable Excel file of this release presents the total imports and exports of services by industry.

Analysis of services trade by industry reveals that exports were driven by information and technology-related industries, while imports were more evenly spread across industries.

Information and technology-related industries drive exports

The professional, scientific, and technical services industry remained the largest exporter of commercial services in 2011, when compared with 2005. Companies in the computer systems design industry provided \$628 million of services, while companies in the other professional, scientific, and technical industry provided \$784 million of services. The information media and telecommunications industry was the second-largest exporter.



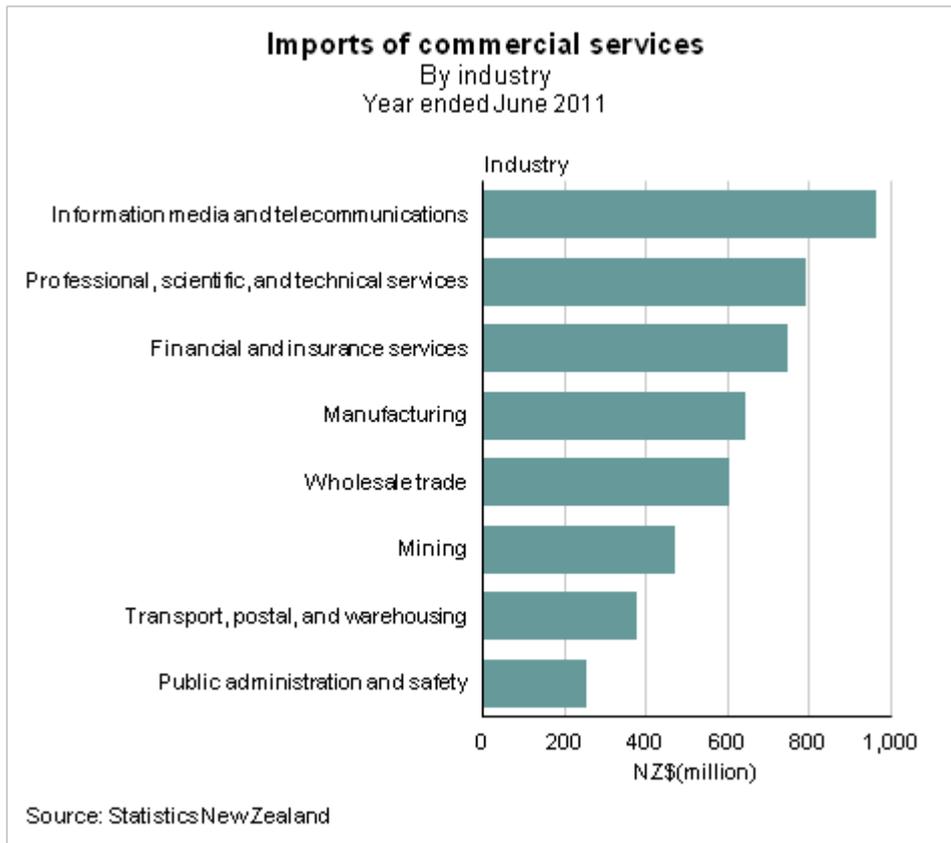
Imports spread across industries

New Zealand companies purchased a range of services from abroad, with the type of service often not being specific to the industry. For example, many industries purchase computer services from abroad.

Some companies do purchase services specific to their industry. Two examples are:

- the wholesaling and manufacturing industries that pay royalties to use brand names and processes related to manufacturing and selling goods

- the information, media, and telecommunications industry that pays broadcast fees to overseas owners or producers of film and television.



Most common way to export services was by the Internet, email, or phone

For the first time, Statistics NZ collected information in the 2011 Census about how commercial services were delivered. This is referred to as the mode of supply.

Cross-border supply was the most common way to export commercial services, accounting for 85.8 percent of exports. This is when New Zealand companies provide services to foreign customers by the Internet, email, or phone. This illustrates New Zealand's geographic isolation and reliance on communication networks to deliver services to foreign customers.

Employees of New Zealand companies providing the service overseas accounted for \$463 million of exports. Overseas customers travelling to New Zealand to receive the service accounted for \$105 million.

While most commercial services were delivered by the Internet, email, or phone, some industries required a physical presence to deliver the service.

In the June 2011 year, 28.0 percent of total technical and professional services were delivered by employees of New Zealand companies temporarily working overseas. This was driven by New Zealand engineers working on overseas project sites.

A significant percentage of miscellaneous services were also delivered by employees of New Zealand companies working overseas (36.2 percent). This was driven by New Zealand teachers consulting and teaching overseas for less than one year.

For more detailed data see the Excel tables in the 'Downloads' box.

Definitions

About the Census of International Trade in Service and Royalties

The census is a full coverage survey that measures the imports and exports of commercial services by New Zealand companies. Commercial services include different services such as computer, communication, financial, business and technical services, and royalties from intellectual property. These service types are further defined below.

The previous census was for the year ended June 2005. Census results provide an accurate picture of the New Zealand service sector at a point in time. The results are also used to improve the quality of the service statistics within the quarterly balance of payments information release.

More definitions

Services: products other than tangible goods. Services result from production activity that changes the conditions of the consuming units, or makes the exchange of products or financial assets possible. Examples of services are:

- a lawyer providing advice to an overseas client
- a client paying a company to perform some market research
- a passenger flying on an overseas airline
- a company paying to have a ship repaired abroad
- a New Zealand branch receiving management services from its head office overseas.

Audio visual services: includes production of film/television/radio, actors fees, animation, and set design.

Commercial services: refers to all services and royalties excluding travel, transportation, insurance, and government services.

Communication services: includes revenue and expenses from postal and courier services, Internet access, fixed and mobile phone services, network services, and transmission services.

Computer services: includes providing IT expertise, designing or developing customised software, managing IT infrastructure, and sales of non-customised software made online. Excludes sales of non-customised software where it is delivered in a physical medium (for example, anti-virus software on a CD).

Construction services: includes the creation, renovation, and repair of buildings and other construction such as bridges or roads. Excludes any work completed abroad by overseas subsidiaries, branches, or offices.

Exports of travel services: covers all expenditure on both goods and services by overseas visitors to New Zealand. This includes holidaymakers, business travellers, and international students. Excludes international airfares.

Imports of travel services: covers all expenditure on both goods and services by New Zealand-resident travellers while overseas. Excludes international airfares.

Exports of transportation services: revenue earned by New Zealand companies from carrying passengers and freight internationally, as well as administration and port expenses received from foreign airlines/shipping companies operating in New Zealand.

Imports of transportation services: expenditure by residents departing New Zealand on overseas airlines, freight payments, and administration and port expenses paid abroad by New Zealand-resident airlines/shipping companies.

Financial services: services relating to transactions of financial instruments. For example:

- a New Zealand stockbroker charging a fee to a foreign client for trading shares
- an investment manager providing advice on a proposed merger and acquisition
- a non-resident bank charging a fee for foreign exchange transactions made by a New Zealand company.

News and information services: includes revenue/expenses related to accessing a database, subscriptions to newspapers or periodicals, and news monitoring services.

Contract manufacturing: fees paid/received for transforming a good into a finished product. For example, a New Zealand company sending wool abroad (retaining ownership of the wool) where it is processed into scarves by an overseas company for a fee.

Management fees between related parties: fees commonly charged by a parent company to its subsidiaries. New Zealand companies will import (pay) management fees from overseas parents, and export (receive) management fees from overseas subsidiaries. Management fees between related parties include charges for managerial and administrative services, and charges for accounting, computer services and royalties. These are often invoiced collectively and cannot be separated by some survey respondents. As a result, imports and exports of management fees cover a range of business services.

Merchanting: goods purchased abroad, and then sold abroad without these goods entering New Zealand. Purchases are collected as imports of merchanting services, while sales are collected as exports of merchanting services. Data is reported on a net basis as merchanting exports only.

Mode of supply: examines where and how a service transaction takes place. The *2010 Manual of Statistics on International Trade in Services* (MSITS) defines four modes of supply:

Cross border (mode 1) supply takes place when a service is supplied from the one country into the territory of another country. This is similar to trade in goods where the product is delivered across borders and the consumer and the supplier remain in their respective territories (eg an architect in New Zealand providing plans and advice to a client in Singapore, through one or more communication media – Internet/phone/fax/mail).

Consumption abroad (mode 2) describes the process by which a consumer resident in one country moves to another country to obtain a service (eg a tertiary student from Hong Kong travelling to New Zealand to study). Services such as ship repair abroad, where only the property of the consumer moves, or is situated abroad, are also covered by this mode.

Commercial presence (mode 3) applies where an enterprise establishes a foreign affiliate/subsidiary abroad in order to deliver services internationally (eg a New Zealand engineering firm establishing a branch in China to provide engineering services to Chinese customers).

Presence of natural persons (mode 4) is when an employee or individual temporarily travels overseas to provide a commercial service to a foreign client. Employees can travel overseas under different arrangements. These could be short-term excursions or corporate transfers/secondments to work in an overseas branch (eg a self-employed business consultant travels overseas to provide business advice; a computer programmer is transferred temporarily to work in an overseas branch of the New Zealand employer; or an engineer is contracted to work on an overseas building site).

Royalties: compensation for the use of property (usually copyrighted works, patented inventions, or natural resources). For example:

- a band has their CD produced by a record label and they receive a proportion of the profits from each CD sold
- an inventor owns a patent on a new product and receives a proportion of the profits from each item sold.

The service type used in table 8 differs from that used in tables 1 and 2. The modes of supply were collected under a different classification, which is explained below:

- **Information and communication technology services** – includes computer and communication services.
- **Financial services** – includes asset management fees and financial advisory services
- **Trade and sales services** – includes advertising, merchanting and contract manufacturing.
- **Business services** – includes accounting, legal, consultancy and management fees between related parties.
- **Entertainment and recreational services** – includes motion picture production, radio, TV and other artistic services.
- **Technical and professional services** – includes engineering, technical testing, research and development, mining and repair services.
- **Intellectual property** – includes royalties from; software, broadcast rights, musical works, brands, patents and trademarks.
- **Miscellaneous services** – includes education, health and conference and presentation services
- **Services not elsewhere classified.**

Related links

Upcoming releases

The *Balance of Payments and International Investment Position: December 2011 quarter* will be released on 21 March 2012.

The [Release calendar](#) lists all our upcoming information releases by date of release.

Past releases

See [Census of International Trade in Services and Royalties: Year ended June 2005](#) for links to past releases.

Data quality

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- [Purpose of the census](#)
- [Target population](#)
- [Response rate](#)
- [Comparison with previous censuses](#)
- [Service classifications](#)
- [Mode of supply](#)
- [Industry classifications used](#)

Survey background

The 2011 Census of International Trade in Services and Royalties surveyed New Zealand businesses for the year ended June 2011. Businesses were asked to report their:

- sales (revenue, exports) of services to overseas
- revenue from royalties and other intangible assets
- purchases (expense, imports) of services from abroad
- and payments for use of royalties and other intangible assets.

In the 2011 Census we also asked business how those services were delivered to their non-resident customers. This question was based on modes of supply as defined by the *Manual on Statistics of International Trade in Services* (MSITS 2010).

The census collected information about New Zealand's international trade in commercial services and royalties. Commercial services are defined as services other than transport, travel, insurance, and government services not included elsewhere. Examples of commercial services measured by the census are business services, information technology and communication services, financial services, and technical and professional services.

The 2011 Census was a joint collection between Statistics New Zealand and the Ministry of Foreign Affairs and Trade (MFAT). As a result, all information collected within the census is released to MFAT, unless the survey respondent objects. One of MFAT's main roles is to work with New Zealand's exporters to improve competition and access to international markets. Information collected by the census is used to reflect the key interests of New Zealand exporters and negotiate international trade agreements.

See [Census of International Trade in Services and Royalties 2011](#) for the survey questionnaire and guide.

Purpose of the census

The main use of this census is to improve the quality of service statistics within the balance of payments current account. The census results are used to calculate the non-sampled estimate. The non-sampled estimate is added to the regular quarterly sample survey data to represent the services trade for the whole population. More specifically, the census results are used to:

- update the non-sampled estimate for the quarterly services series (this will be revised back to the September 2005 quarter)

- generate a new non-sampled estimate for use in the quarterly sample survey (this will be carried forward until the next census)
- update the quarterly survey population (to account for new entrants and service categories).

Indications are that the quarterly service series for exports and imports for the year ended June 2011 will be revised upwards, due to the new census. The revisions to the quarterly series will extend back to the September 2005 quarter. These revisions will be published on 21 September 2012, with the *Balance of Payments and International Investment Position: June 2012 quarter* information release.

The level of revenue and expenditure measured by the census shows change when compared with the previous sample-based quarterly series. The main reasons for the changes are:

- the quality of the non-sampled estimate in the quarterly series
- growth in the services sector, which is not reflected in the quarterly series and non-sampled estimate
- better reporting by companies in both the quarterly and census population. A detailed survey guide was sent out with the census to explain the concepts.

Target population

The 2011 Census had population of approximately 6,300 New Zealand businesses. These businesses were identified primarily from the Statistics New Zealand Business Frame. The business frame is a database of New Zealand businesses, with GST exceeding \$30,000. Therefore, the census population excluded enterprises below that threshold. Also excluded from the census were New Zealand individuals engaged in international service transactions.

Statistics NZ added enterprises from industry sources, and the business news and media.

Response rate

The response rate to the 2011 Census was 88 percent. Of all the enterprises surveyed, 55.2 percent responded with data, while 32.8 percent reported no data. Many respondents spent considerable time and effort providing data. Statistics NZ is very appreciative of the these contributions.

Comparison with previous censuses

A Census of International Trade in Services and Royalties was also conducted in 1992, 1999, and 2005. Each census used a June year reference period, to allow comparability over time.

Export and import values are in current prices, so no adjustment is made for price changes. This means the increase in the export and import of commercial services since 2005 reflects increases in both prices and volumes. More useful conclusions about the series over time can be made by: assessing the relative importance to New Zealand's international trade in commercial services to total services, and examining the contribution of specific commercial service types to total commercial services. Several new service classifications were collected within the 2011 Census including: environmental services, contract manufacturing fees, and emission unit trading.

Since the previous censuses, service definitions and classifications have changed. While the broad categories of service types remain (the EBOPS classification used in the census is an

extension of the IMF's *Balance of Payments Manual*, Edition 5, (BPM5) classification), the 2011 Census questionnaire used more disaggregated and explicit descriptions of services under each category, drawing on the developments in the 2010 *Manual on Statistics on International Trade in Services*.

Service classifications

The *Manual on Statistics of International Trade in Services* (MSITS) was originally published in 2002. This manual was a joint production by six international organisations – the United Nations Statistical Commission, the European Commission, the IMF, the Organisation for Economic Co-operation and Development (OECD), the United Nations Conference on Trade and Development, and the World Trade Organisation.

The MSITS was revised and subsequently re-published in 2010 (MSITS 2010). The contents of the new edition of the manual were aligned to the revisions of the sixth edition of the BPM6, the System of National Accounts 2008, and the revised OECD Benchmark Definition of Foreign Direct Investment. MSITS 2010 also includes a new chapter discussing the measurement of services 'modes of supply', in line with information needs related to the General Agreement on Trade in Services (GATS).

The aim of MSITS 2010 is to provide an internationally agreed framework for compiling and reporting statistics on international trade in services. The manual sets out how to collect data so it can inform policy around GATS.

The manual provides a detailed view on international trade in services. The main features of the manual are the classification of services into 12 main types and the introduction of the concept of 'modes of supply'.

The 12 major categories of services are:

- manufacturing services on physical inputs owned by others
- maintenance and repair services not included elsewhere (nie)
- transport
- travel
- construction
- insurance and pension services
- financial services
- charges for the use of intellectual property nie
- telecommunications, computer, and information services
- other business services
- personal, cultural, and recreational services
- government goods and services nie.

Mode of supply

Modes of supply are statistics that examine where and how an international service transaction takes place. Mode of supply is important as it has implications for free-trade policy. By analysing the mode of supply, trade negotiators can identify strengths and weaknesses within the service sector.

Estimating the mode of supply for commercial services

Mode 3, **Commercial presence**, is not relevant to the balance of payments. When a commercial presence is established within a foreign economy, the branch/subsidiary becomes a resident of the foreign economy. All service transactions between the subsidiary and foreign residents are between two non-resident parties. The balance of payments measures transactions between residents and non-residents.

As a result, the Census of International Trade in Services and Royalties only collected information on three modes of supply – cross-border supply, presence of natural persons, and consumption abroad. These three were determined by asking survey respondents to classify their service exports as:

- delivered from New Zealand to a customer overseas – eg by Internet, phone, or mail (cross border)
- delivered to an overseas customer by a New Zealand employee temporarily working abroad (presence of natural persons)
- delivered to an overseas customer temporarily in New Zealand (consumption abroad).

For each export service type and destination, respondents were asked to give a percentage breakdown (by mode) of how the service was performed. This allowed respondents to classify a service as being delivered by more than one mode if necessary. For example, an engineering company may provide technical consulting from New Zealand over the Internet, but also travel abroad to visit the project site.

These mode percentages were multiplied by export revenue to derive the figures presented in tables 8 and 9 of this release. When a respondent did not indicate the mode of supply, the mode was estimated, based on the type of service being delivered.

The service categories used in table 8 are based on the sections in the 2011 questionnaire. The contents of each section are described below.

- Information and communication technology services – includes computer and communication services (eg IT design, consulting, and support; telecommunication and Internet access services).
- Financial services – includes asset management fees and financial advisory services.
- Trade and sales services – includes advertising, merchandising, and contract manufacturing.
- Business services – includes accounting, legal, consultancy, and management fees between related parties.
- Entertainment and recreational services – includes motion picture production, radio, TV, and other artistic services.
- Technical and professional services – includes engineering, technical testing, research and development, mining, and repair services.
- Intellectual property – includes royalties from software, broadcast rights, musical works, brands, patents, and trademarks.
- Miscellaneous services – includes education, health, and conference services.
- Services not elsewhere classified.

Industry classifications used

The Australian Bureau of Statistics and Statistics NZ jointly developed the Australian and New Zealand Standard Industrial Classification (ANZSIC). ANZSIC is used in compiling and analysing industry statistics in Australia and New Zealand, and enhances the comparability of industry statistics between the two countries and the rest of the world.

For more detailed information on the ANZSIC 2006 and 1993 editions, see [Industrial classification](#) on the Statistics NZ website.

Confidentiality and accessing the data

Where data within a table in this release discloses information about an individual respondent, or would allow close estimation of such information, we publish data only after obtaining the consent of those respondents (ie published under section 37(4)(a) of the Statistics Act 1975). Where affected respondents have not provided their consent, data remains confidential.

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Tables

The following tables are included with this release. They are available in Excel format from the 'Downloads' box of *Census of International Trade in Services and Royalties: Year ended June 2011* on the Statistics NZ website.

If you do not have access to Excel, you may use the [Excel file viewer](#) to view, print, and export the contents of the file.

1. Exports of services
2. Imports of services
3. Exports by selected country and economic group
4. Imports by selected country and economic group
5. Exports by an extended list of countries
6. Imports by an extended list of countries
7. Exports and imports of commercial services by industry
8. Exports of services by mode of supply and broad service type
9. Exports of services by mode of supply and country

The following **supplementary tables** are available on the Statistics NZ website.

1. Exports of communication services by country
2. Exports of construction services by country
3. Exports of financial services by country
4. Exports of computer services by country
5. Exports of news and information services by country
6. Exports of software royalties by country
7. Exports of other royalties and franchises by country
8. Exports of commission agents' services by country
9. Exports of legal services by country
10. Exports of accounting services by country
11. Exports of management, consultancy, and public relations services by country
12. Exports of advertising services by country
13. Exports of research and development services by country
14. Exports of architectural, engineering, and other technical services by country
15. Exports of other services by country
16. Exports of personal, cultural, and recreational services by country
17. Imports of communication services by country
18. Imports of construction services by country
19. Imports of financial services by country
20. Imports of computer services by country
21. Imports of news and information services by country
22. Imports of software royalties by country
23. Imports of other royalties and franchises by country
24. Imports of commission agents' services by country
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28. Imports of advertising services by country
29. Imports of research and development services by country
30. Imports of architectural, engineering, and other technical services by country
31. Imports of other services by country
32. Imports of personal, cultural, and recreational services by country