WORLD TRADE ORGANIZATION

RESTRICTED

S/C/W/329/Add.1
7 January 2011

(11-0080)

Council for Trade in Services

A REVIEW OF STATISTICS ON TRADE FLOWS IN SERVICES - OVERVIEW OF TRADE FLOWS IN COMMERCIAL SERVICES 2000-2010

Note by the Secretariat[1]

Addendum

1. This Note supplements document S/C/W/329. It provides an overview of world trade in commercial services in the last decade, including an analysis of the impact of the financial crisis, by individual service sector, region, and selected leading economies.

2. The analysis is mainly focused on export trends due to the better quality of these statistics, and reflects the increased availability of trade in services statistics. In addition, the paper provides statistics on the sales of majority-owned foreign affiliates (outward and inward FATS sales). For outward FATS, information is also broken down by main industry. Finally, the paper reviews short-term trade developments during and after the financial crisis.

I. TOTAL COMMERCIAL SERVICES

A. TRADE DEVELOPMENTS BETWEEN 2000 AND 2008

3. Between 2000 and 2008, world exports of commercial services rose by 13 per cent on average per year, led by growing exports of other commercial services (15 per cent) and transportation services (13 per cent). By comparison, travel was less dynamic (9 per cent). As a result, over the years, the structure of world exports of commercial services changed. While the share of transportation services exports in total commercial services remained stable around 23-24 per cent, that of travel declined from 32 per cent in 2000 to 25 per cent in 2008. Other commercial services, which accounted for 45 per cent of total commercial services exports in 2000, represented more than half of total exports of commercial services in 2008. Among them, computer and information services were the most dynamic sector, increasing by 19 per cent, followed by insurance services and construction (16 per cent).

[1] This document has been prepared under the Secretariat's own responsibility and without prejudice to the positions of Members and to their rights and obligations under the WTO.

Table 1: World trade in commercial services by category, 2000-2008

(Billion dollars and percentage)

	Exports				Imports			
	Value	Share in world trade		Annual change	Value	Share in world trade		Annual change
	2008	00	08	00-08	2008	00	08	00-08
Total commercial services	3830	100	100	13	3560	100	100	12
Transportation services	910	23	24	13	1070	29	30	12
Travel	960	32	25	9	870	30	24	9
Other commercial services	1960	45	51	15	1620	41	46	13

Source: WTO estimates**.**

4. Europe's exports, largely accounted for by the European Union (27), expanded by 13 per cent on annual average, fuelled by other commercial services exports. In 2008, around 52 per cent of the world's total exports of commercial services originated from European countries. In North America, sluggish travel exports growth resulted in the United States' and Canada's exports of commercial services rise below the world average (by 8 per cent and 7 per cent respectively). Over the period, the United States' share of world exports of total commercial services declined from 19 per cent in 2000 to around 14 per cent in 2008.

5. Asia's exports increased by 14 per cent annually. In particular, China's exports grew rapidly (22 per cent) supported by a thriving transport sector and expanding exports of other commercial services. Exports from Japan, by contrast, rose by 10 per cent due to slower growth of transportation services exports. India's exports were driven by other commercial services, which, in 2008, accounted for 77 per cent of the total commercial services exports.[2] Over recent years, India has become a leading Business Process Outsourcing (BPO) destination. Singapore's exports were very dynamic (17 per cent) due to robust growth of other commercial services while exports from Hong Kong, China grew by 11 per cent. Finally, significant travel revenues, resulting from the gaming industry, boosted exports of commercial services from Macao, China which recorded the strongest growth in the region (23 per cent).

6. In South and Central America, exports of commercial services increased by 11 per cent on average per year. However, while large exporters expanded rapidly, smaller countries in the region recorded growth rates considerably lower than the world's average. For example, growth in Southern American economies' exports was above 13 per cent, while Caribbean's exports of commercial services rose overall only by some 8 per cent. This is due to the fact that Caribbean countries are often dependent on exports in one service sector, mainly tourism, which is very vulnerable to the occurrence of natural disasters such as hurricanes, and changes in consumers' consumption habits. In Argentina and Brazil, on the contrary, the main drivers of export growth were other commercial services, which have been globally the most dynamic service component over recent years.

7. In Africa, higher transport and travel receipts contributed to a 12 per cent average annual rise in Egypt's exports of commercial services.[3] By comparison, in Morocco, the second largest services exporter in Africa, exports were more dynamic (21 per cent) fuelled by expanding travel and other commercial services exports. According to available data, in several Sub-Saharan African countries average period growth was above 15-20 per cent.

[2] The presence of methodological breaks in series does not allow providing a precise measure of India's average annual exports growth.

[3] Due to methodological breaks in time series, the growth rates of Africa and Middle East cannot be provided.

8. In the Middle East, the United Arab Emirates' exports grew considerably since 2000 (22 per cent annually), due in particular to the rapid expansion of the travel sector. By contrast, exports from Israel, the main services exporter in the Middle East, increased below the world average due to stagnating travel exports. Lebanon's exports rose by around 26 per cent between 2002 (first available year) and 2008, as the country emerged as a leading travel destination. Kuwait saw the most rapid growth in the region, increasing by over 26 per cent. Over recent years, the country became a leading exporter of telecommunications services.

9. The CIS' exports rose by 22 per cent on average per year as a result of the Russian Federation's strong export performance. In 2008, the country accounted for 60 per cent of the region's exports of total commercial services. In the CIS, rapid increases were recorded in the three main export categories, with other commercial services exports growing by 32 per cent on average per year. A large number of economies in the region recorded over 30 per cent average annual export growth.

10. Between 2000 and 2008, world imports of commercial services rose by 12 per cent annually. With 21 per cent, the CIS recorded the most rapid growth, followed by Europe and Asia (12 per cent each). North America and South and Central America grew respectively by 7 per cent and by 10 per cent.

11. In Europe, the EU(27) and Switzerland's imports increased by an annual 12 per cent. In the CIS, the Russian Federation's imports, which represented almost two thirds of the region's total imports in 2008, rose by 21 per cent, However, growth was more pronounced in Ukraine and Kazakhstan (25 per cent each). In Asia, Japan's imports increased only by 6 per cent on average per year. By contrast, in China, commercial services payments grew by 20 per cent. In North America, the United States' imports grew by 7 per cent, while in Canada recorded growth was by 9 per cent. In South and Central America, Brazil's imports grew by 14 per cent. The country in 2008 accounted for 37 per cent of the region's total commercial services imports. Argentina, the second largest importer in the region, lagged behind with only 4 per cent annual import growth.

12. Due to methodological breaks in time series, the period growth of the Middle East and Africa cannot be provided. However, in Egypt, imports increased by 11 per cent on average per year, and in Angola by 31 per cent. In the Middle East, the United Arab Emirates' imports rose by 23 per cent and in Kuwait by 14 per cent.

Table 2: Trade in commercial services by region and selected economies, 2000-2008

(Billion dollars and percentage)

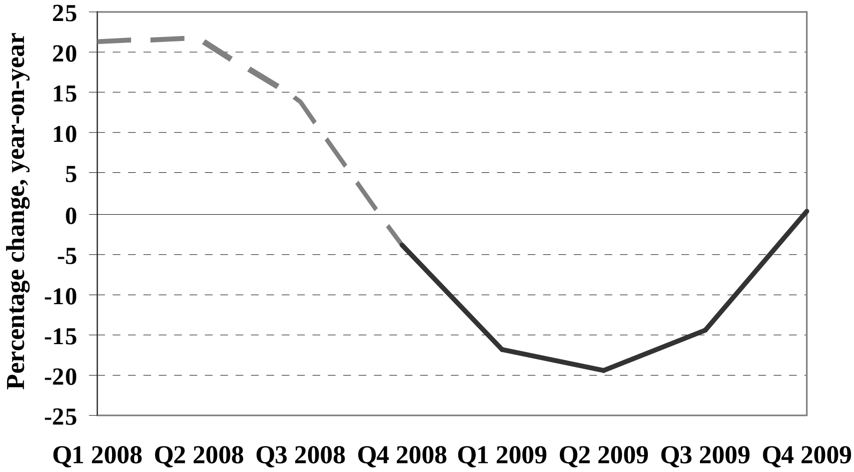
	Exports				Imports			
	Value	share in world trade		Annual change	Value	share in world trade		Annual change
	2008	00	08	00-08	2008	00	08	00-08
World	3830	100	100.0	13	3560	100.0	100.0	12
North America	603	22.3	15.8	8	478	18.4	13.4	7
United States	518	18.7	13.5	8	365	14.2	10.3	7
Canada	66	2.6	1.7	7	88	3.0	2.5	9
Mexico	18	0.9	0.5	4	25	1.1	0.7	5
South and Central America	109	3.1	2.8	11	120	3.8	3.4	10
Brazil	29	0.6	0.8	16	44	1.1	1.2	14
Argentina	12	0.3	0.3	12	13	0.6	0.4	4
Chile	11	0.3	0.3	13	11	0.3	0.3	12
Europe	1971	48.4	51.5	13	1643	45.6	46.2	12
EU (27)	1787	43.5	46.7	14	1531	42.7	43.1	12
Switzerland	76	2.0	2.0	13	36	1.0	1.0	12
Turkey	35	1.3	0.9	8	17	0.5	0.5	10
CIS	84	1.2	2.2	22	113	1.6	3.2	21
Russian Federation	51	0.6	1.3	23	74	1.1	2.1	21
Ukraine	17	0.3	0.5	21	16	0.2	0.4	25
Belarus	4	0.1	0.1	20	3	0.0	0.1	22
Africa	86	...	2.2	...	137	...	3.8	...
Egypt	25	0.7	0.6	12	16	0.5	0.5	11
Morocco	13	0.2	0.3	21	6	0.1	0.2	18
South Africa	12	...	0.3	...	17	...	0.5	...
Middle East	98	...	2.6	...	188	...	5.3	...
Israel	24	1.0	0.6	6	20	0.8	0.6	7
Lebanon	18	...	0.5	...	13	...	0.4	...
Kuwait	10	0.1	0.3	26	12	0.3	0.3	14
Asia	875	20.5	22.9	14	876	24.7	24.6	12
Japan	147	4.7	3.8	10	163	7.2	4.6	6
China	146	2.0	3.8	22	158	2.5	4.4	20
India	103	...	2.7	...	87	...	2.5	...
Singapore	97	1.9	2.5	17	86	2.0	2.4	14
Hong Kong, China	92	2.7	2.4	11	47	1.7	1.3	8
Korea, Republic of	76	2.0	2.0	12	93	2.3	2.6	14

Source: WTO estimates, IMF, and national data.

B. RECENT TRENDS (2009-2010)

13. In 2009, world exports of commercial services declined by 12 per cent to US$ 3,350 billion due to the global economic downturn. By comparison, world merchandise exports dropped by 23 per cent. In the second quarter of 2009, at the lowest point of the crisis, world commercial services exports dropped by almost 20 per cent on average year-on-year. However, exports started to recover quickly in the second half of the year.

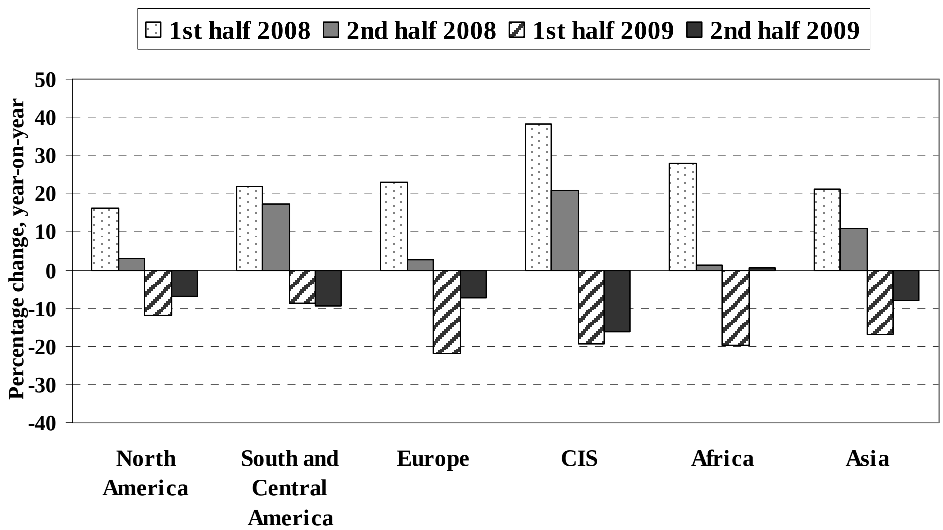
Chart 1: World exports of total commercial services Q1 2008 – Q4 2009
(Percentage change, year-on-year)



Source: WTO estimates.

14. In 2009, all regions were affected by the adverse economic context. Europe's exports of commercial services declined by 14 per cent and Asia's exports contracted by 12 per cent. In North America and Africa, the decline was 9 per cent. In South and Central America the decrease was by 8 per cent. The sharpest drop was recorded in the CIS where exports fell by 17 per cent. In the Middle East exports contracted by 4 per cent.

Chart 2: Exports of commercial services by selected region, first half 2008- second half 2009
(Percentage change, year-on-year)



Source: WTO estimates.

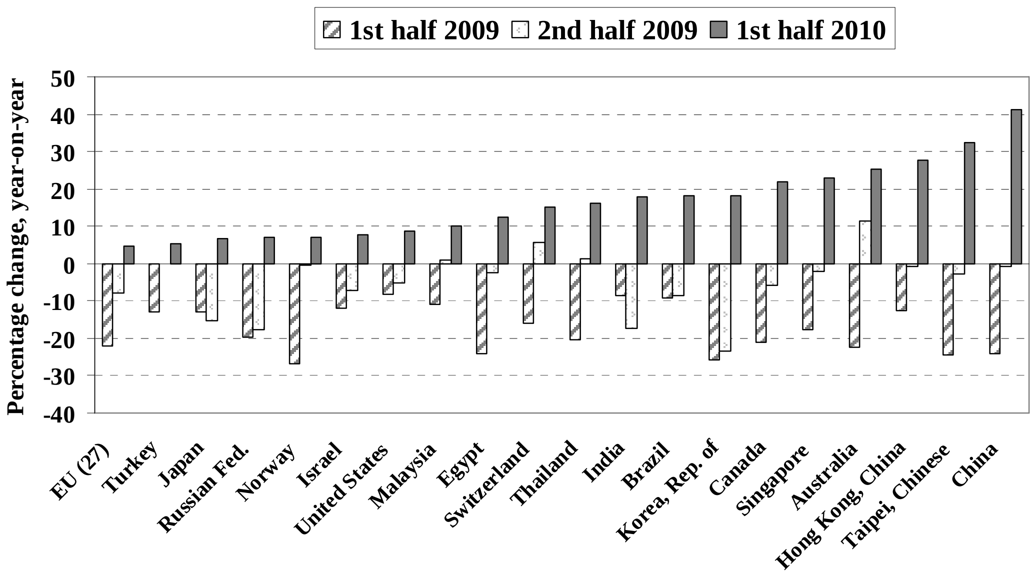
15. In 2009, world imports of commercial services declined by 12 per cent to US$3,145 billion. In the CIS, which had recorded the strongest growth in the period 2000-2008, imports dropped by 20 per cent. African imports of commercial services were also severely affected, declining by 16 per cent. In Europe, imports were down by 13 per cent. In North America, payments decreased by 10 per cent. Imports by Asian and Middle Eastern economies fell overall by 9 per cent and in South and Central America by 8 per cent.

16. According to the Secretariat's preliminary estimates, in the first half of 2010, world exports of commercial services increased by 11 per cent compared to the same period of 2009.[4] Asia, in particular developing Asia, is leading the recovery process, recording 26 per cent average growth year-on-year. In the period January-June 2010, China' exports of total commercial services expanded by 41 per cent, followed by Chinese Taipei (33 per cent), and Hong Kong, China (28 per cent). Exports from India, the Republic of Korea and the Philippines rose each by a robust 18 per cent. Within the region Japan lagged behind (7 per cent).

17. In North America, exports grew by 10 per cent. While United States' exports of commercial services increased by 9 per cent only, Canada's were more dynamic, growing by 22 per cent. Europe's exports rose at a slower pace (5 per cent year-on-year) due to the EU (27) as well as other economies' relatively weaker performance. With 15 per cent year-on-year growth, Switzerland's exports represented an exception in the region.

18. In South and Central American countries, rebound was fast. Brazil and Argentina's exports grew at 18 per cent and 13 per cent, respectively. The CIS rose by 10 per cent year-on-year in the first half of 2010, mainly due to the Ukraine and Belarus (18 per cent and 35 per cent respectively). The Russian Federation's exports rose by 7 per cent.

Chart 3: Exports of commercial services of selected leading economies, first half 2009 - first half 2010
(Percentage change, year-on-year)



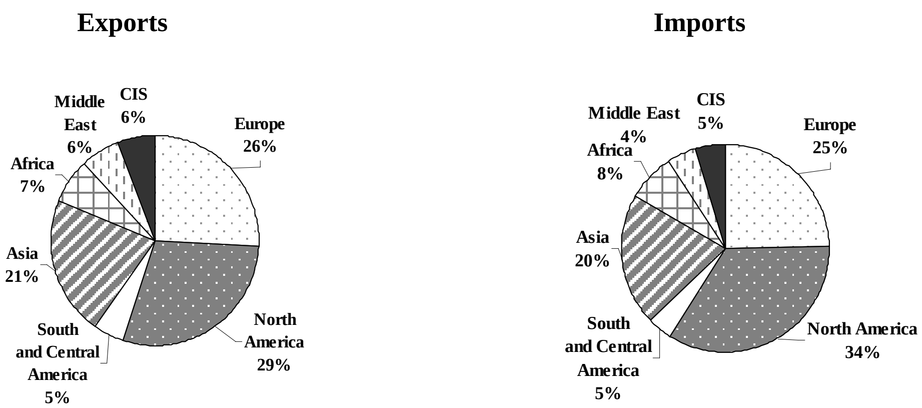
Source: IMF, Eurostat and national sources.

[4] On the basis of available data of economies, representing 90 per cent of world exports of commercial services in 2008 and 2009.

C. TRENDS IN BILATERAL FLOWS OF TOTAL COMMERCIAL SERVICES IN SELECTED ECONOMIES

19. At present only some 50 economies, mainly developed, report their bilateral trade in services flows by partner on a Balance of Payments basis. Thus, it is difficult to trace the direction of trade at the world level.[5] The regional breakdown of extra-EU(27) trade in commercial services shows that in 2008, North American countries were the main destination of exports, with the United States representing 26 per cent. However, the share of exports to the United States gradually decreased over recent years. More than a quarter of exports were destined to other European countries, mainly Switzerland and Norway. Asian economies accounted for 21 per cent. The main partners in the region were China and Japan (4 per cent each). Exports to other regions were lower ranging between 5 and 7 per cent. The structure of extra-EU(27) commercial services imports is very similar. With more than one third of share, North America, largely the United States, was also the main source of imports. Some 25 per cent of imports originated from neighbouring European countries and 20 per cent from Asia.

Chart 4: Extra-EU(27) - Exports and imports of commercial services by region, 2008 (Percentage)



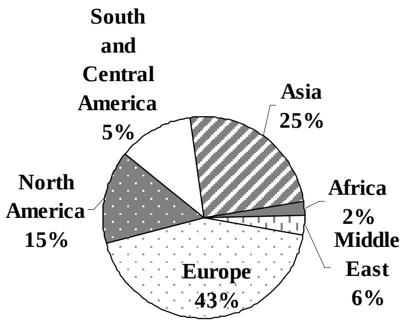
Source: Eurostat.

20. In the United States, over 40 per cent of exports of commercial services were destined to Europe, mainly to EU countries. One quarter of exports reached Asia, with Japan accounting for the largest share in the region (8 per cent) but in a declining trend. Exports of commercial services to North America made up for an additional 15 per cent. Exports to other regions were by comparison more modest. The structure of the United States imports mirrors, to a large extent, that of exports, with European countries accounting for the largest share, and Asian economies representing a quarter of total commercial services imports. However, the share of imports from South and Central American countries was much higher, around 10 per cent. Imports from Middle Eastern and African countries were very modest, around 2 per cent of total imports.

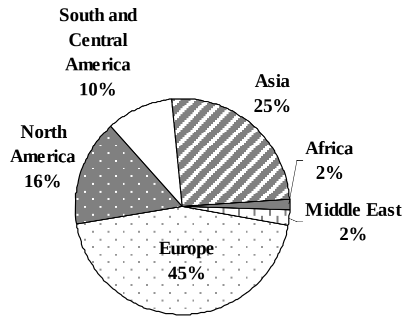
[5] The Statistical Annex contains charts on total commercial services exports and imports by main partners for several economies.

Chart 5: United States - Exports and imports of commercial services by region, 2008
(Percentage)

Exports



Imports



Note: Europe includes the CIS countries.
Source: US BEA.

D. OUTWARD FATS SALES IN SELECTED ECONOMIES (TOTAL SALES)

21. Establishing a commercial presence abroad is a means used by service suppliers to provide services in a host country where there is need for proximity with the consumer. However, it may also be seen as a way for a company to benefit from the specialization in specific sectors in order to supply better and cheaper services (either to outsource some activities or to further provide these services on the export market). As explained in S/C/W/329 lack of data and/or confidentiality issues affect in particular outward FATS statistics, thus only scattered information and for a limited number of reporters, can be presented on the sales made by majority-owned affiliates in a foreign economy.[6] In addition, in FATS statistics published by most economies, total sales include both sales of goods and sales of services.

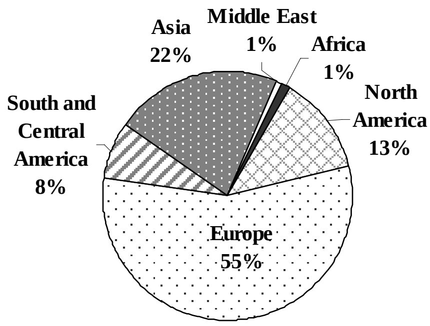
22. The United States publishes separately total services supplied by foreign affiliates, which conceptually is more in line with information needs in relation to GATS. In 2008, foreign affiliates of US firms supplied services abroad for US$1136.9 billion increasing by 14 per cent on average per year since 2004 (first available year).[7] Some 55 per cent of the services were supplied by US affiliates established in Europe. In particular, affiliates in the EU (27) sold services for US$561.4 billion. In Asia, US foreign affiliates rendered services for US$246.1 billion (22 per cent of the total). US affiliates located in Japan made up for 6 per cent of the total services supplied, followed by Australia, and Singapore (each 3 per cent). Hong Kong, China, and China accounted respectively for 2 per cent each. In North America, the main partner was Canada (10 per cent) while in South and Central America, it was Brazil (2 per cent). Although the share of services sold in the Middle East was only 1 per cent, services supplied by US affiliates in these countries grew very rapidly, averaging an annual 31 per cent since 2004. According to available information, in 2008, most services were supplied by US affiliates in wholesale trade (21 per cent), finance (15 per cent), insurance (6 per cent), and retail trade (6 per cent).

---

[6] Outward FATS statistics measure the activities of majority-owned affiliates of domestic firms established in foreign countries.

[7] This information refers to supply of services products to foreigners by United States owned affiliates. This differs from the FATS data presented for the United States in the table in the Statistical Annex which refers to sales of foreign affiliates operating in the services sector. For instance the latter include sales of goods of foreign affiliates whose primary activity is classified as a service industry but not the supply of services of those whose primary activity is classified as a manufacturing industry. Source: US BEA.

Chart 6: Services supplied by the United States through its majority-owned foreign affiliates by region (outward FATS), 2008
(Percentage)



Note: Europe includes the CIS countries.
Source: US BEA.

23. Moving to Europe, in 2008, total sales (goods and services) of German foreign affiliates engaged in services industries in foreign countries (excluding wholesale and retail trade and repair activities) reached some US$504 billion. In the period 2005-2008, sales grew by 8 per cent on annual average. Around 53 per cent of the sales were made by affiliates established in EU(27) countries, while the United States, with a share of 25 per cent, was the main extra-EU(27) partner. Total sales by French foreign affiliates in services activities (excluding wholesale and retail trade and repair activities), which in 2007 reached US$362 billion, presented a similar pattern. More than half of the sales originated from affiliates established in EU (27) countries, and a 21 per cent from those in the United States. In the same year, around 79 per cent of the US$159.1 billion sales by Italian foreign affiliates engaged in services abroad came from affiliates in EU(27) countries.

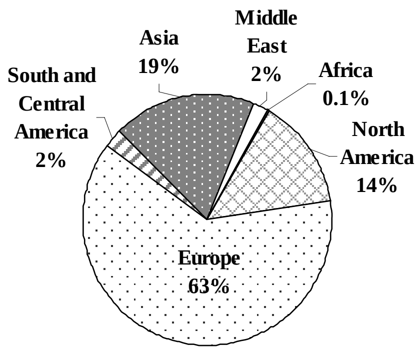
24. Recently Israel started compiling FATS statistics. In 2005, subsidiaries of Israeli firms totalled US$3 billion of sales abroad.[8] Over 50 per cent of sales was generated by foreign affiliates in computer and related activities, and 19 per cent by affiliates in research and development (R&D).

E. INWARD FATS SALES IN SELECTED ECONOMIES (TOTAL SALES)

25. According to the United States data, in 2008, services supplied to the United States by majority-owned affiliates of foreign firms reached US$714.3 billion, rising by 7 per cent on annual average since 2004. With a share of 63 per cent, European countries, largely the EU(27), were the main services suppliers to the United States, followed by Asian economies (largely Japan with 14 per cent). North American countries accounted for 14 per cent of the total service supplied. By contrast, the value of services provided by affiliates of South and Central America countries as well as Middle Eastern economies was very modest accounting each for 2 per cent. Finally, services supplied by affiliates of African firms represented only 0.1 per cent of the total. In 2008, foreign affiliates established in the United States were active especially in wholesale trade (22 per cent) and financial intermediation activities (20 per cent).[9]

[8] Excluding wholesale and retail trade and repair activities as well as some or all community, social and personal services activities.
[9] Source: US BEA.

Chart 7: Services supplied to the United States through majority-owned foreign affiliates by region (inward FATS), 2008
(Percentage)



Note: Europe includes the CIS countries.
Source: US BEA.

26. In Europe, total sales by affiliates of foreign firms engaged in services (excluding wholesale and retail trade and repair activities) in Germany attained US$200 billion in 2006. Foreign affiliates were present especially in financial intermediation activities (29 per cent), telecommunications (15 per cent), as well as transport and storage (13 per cent). In France, foreign affiliates' sales reached US$176 billion in 2007, while in Italy they attained US$110 billion.[10]

27. Finally, in Asia, foreign affiliates located in Japan totalled sales for US$27 billion in 2006,[11] while those located in Hong Kong, China reached US$142 in 2007.[12] According to preliminary statistics, in 2008, sales by foreign affiliates in services activities established in China attained US$133.96 billion (excluding wholesale and retail trade and repair activities).

[10] Excluding wholesale and retail trade and repair activities, as well as a large part or all financial intermediation.
[11] Excluding wholesale and retail trade and repair activities, real estate activities, as well as financial intermediation.
[12] Data for Hong Kong, China include other income.

Table 3: BOP/EBOPS services items
Transportation services covers sea, air and other including land, internal waterway, space and pipeline transport services that are performed by residents of one economy for those of another, and that involve the carriage of passengers, the movement of goods (freight), rentals (charters) of carriers with crew, and related supporting and auxiliary services.
Travel includes goods and services acquired by personal travellers, for health, education or other purposes, and by business travellers. Unlike other services, travel is not a specific type of service, but an assortment of goods and services consumed by travellers. The most common goods and services covered are lodging, food and beverages, entertainment and transportation (within the economy visited), gifts and souvenirs.
Other commercial services corresponds to the following components:
(i) Communications services includes postal, courier and telecommunication services. Telecommunications services encompasses the transmission of sound, images or other information by telephone, telex, telegram, radio and television cable and broadcasting, satellite, electronic mail, facsimile services etc., including business network services, teleconferencing and support services. It does not include the value of the information transported. Also included are cellular telephone services, Internet backbone services and on-line access services, including provision of access to the Internet.
(ii) Construction services covers work performed on construction projects and installation by employees of an enterprise in locations outside the territory of an enterprise. The BOP one-year rule of minimum local presence, used for determining the residency status of an entity, is applied flexibly for this item and many situations of temporary commercial presence are thus captured. In addition goods imported by construction companies for their projects are included in BPM5 which implies that the "true" services component tends to be overestimated.
(iii) Insurance services covers the provision of various types of insurance to non residents by resident insurance enterprises, and vice versa. The service charge is often estimated using data on gross premiums and gross claims. In EBOPS insurance services are further subdivided into five more detailed components.
(iv) Financial services covers financial intermediation and auxiliary services provided by banks, stock exchanges, factoring enterprises, credit card enterprises, and other enterprises.
(v) Computer and information services is subdivided into computer services (hardware and software related services and data processing services), news agency services (provision of news, photographs, and feature articles to the media), and other information provision services (database services and web search portals).
(vi) Royalties and license fees is far wider than the category "franchising" used in the MTN.GNS/W/120. In the MTN.GNS/W/120 franchising is classified under distribution services, defined according to the CPC provisional version item 8929 Other non-financial intangible assets, which is defined as follows: "Royalties for the right to use (...) exclusive rights (...), not elsewhere classified, owned by other economic agents." It is not entirely clear why such royalties have been listed in W/120, while payments for the use of patents, copyrights or trademarks have not been included. The balance of payments item *royalties and license fees* includes franchises and similar rights and other royalties and license fees. The former comprises international payments and receipts of franchising fees and the royalties paid for the use of registered trademarks. Other royalties and license fees include transactions for the authorised use of patents, copyrights, and industrial processes and designs and the use, through licenses of produced originals or prototypes (such as manuscripts and computer programs).
(vii) Other business services includes merchanting and other trade-related services; operational leasing (rentals) services; and miscellaneous business, professional, and technical services, such as legal, accounting, auditing, management consulting, public relations services, advertising, market research and public opinion polling, research and development services, architectural, engineering, and other technical services, agricultural, mining an on-site processing.
(viii) Personal, cultural, and recreational services comprises (i) audiovisual and related services and (ii) other personal, cultural, and recreational services. The first component includes services and fees related to the production of motion pictures, radio and television programmes, and musical recordings. Other personal, cultural, and recreational services includes services such as those associated with museums, libraries, archives, and other cultural, sporting, and recreational activities. EBOPS provides for the production of additional information within the latter item among two separate sub-components: education services and health services (i.e. not travel related).

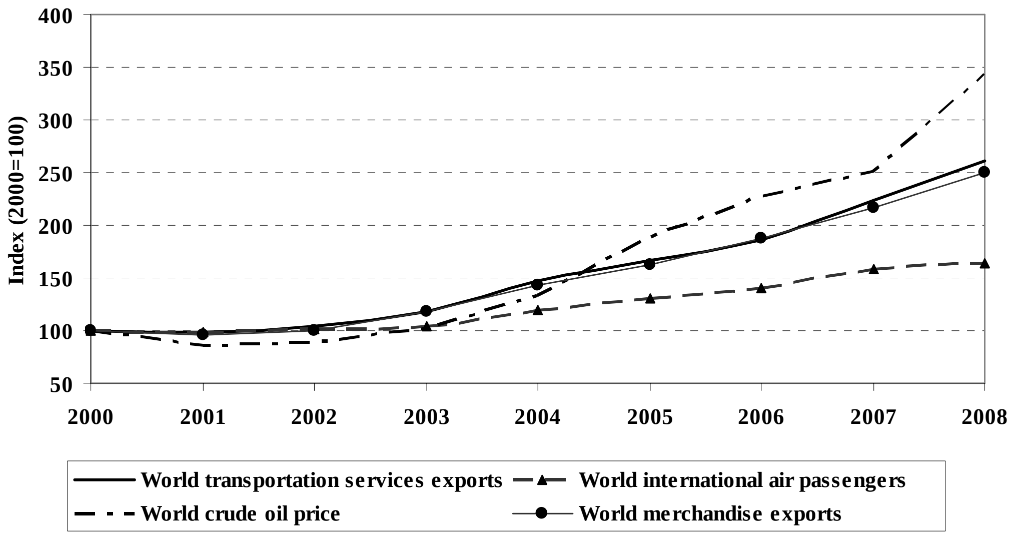
II. TRANSPORTATION SERVICES

A. TRADE DEVELOPMENTS BETWEEN 2000 AND 2008

28. Rising fuel prices, expanding merchandise trade and higher international air passenger traffic resulted in world export of transportation services to grow by 13 per cent on average per year. In 2008, half of world exports of transportation services originated from **Europe**. Exports from the European Union (27) increased by 14 per cent fuelled by rising receipts from sea freight transportation services. Sea transport is the most important mode for long distance transport of EU(27) goods. In 2008, 63 per cent of all freight handled in EU (27) ports was destined to or originated from an extra-EU(27) port.[13]

29. In the **Commonwealth of Independent States (CIS)**, the Russian Federation's transportation services exports, which account for half of the region's total, rose by 20 per cent, mainly due to increased air passenger transport exports. Exports of pipeline transportation services, notably for the transit of oil and natural gas, also expanded rapidly. With almost 27 per cent average annual growth, Azerbaijan recorded the most rapid growth within the region.

Chart 8: World transportation services exports, merchandise exports,crude oil price and international air passengers, 2000-2008 (Index 2000=100)

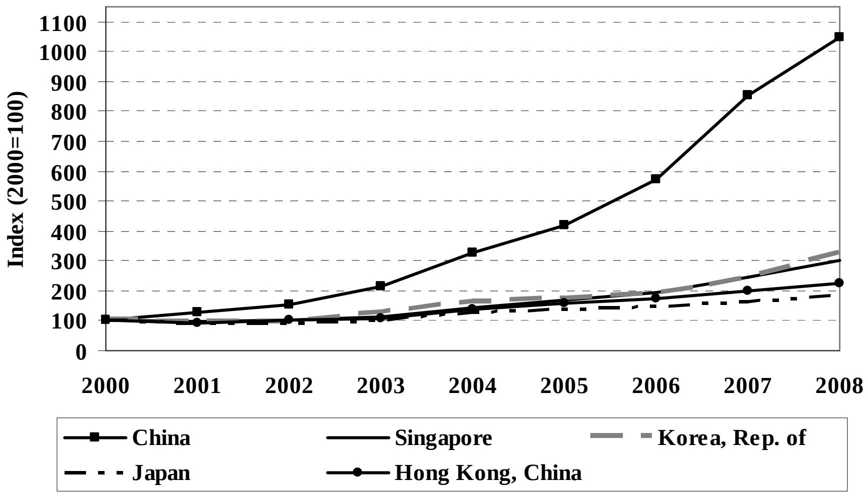


Source: WTO, ICAO and IMF.

30. In **Asia**, a new player entered the transportation services export sector. Between 2000 and 2008, China's exports increased by 34 per cent on average per year. By comparison, other traditional Asian transport services exporters lagged behind. Japan, the largest trader within the region, recorded the lowest increase (8 per cent), followed by Singapore (15 per cent) and the Republic of Korea (16 per cent). China's record export growth was due to higher revenues from sea freight transportation services (42 per cent), which, in 2008, accounted for two thirds of the economy's transport exports. In the same year, over 22 per cent of world container port throughput originated from China.[14]

[13] Source: Eurostat, Statistics in Focus 11/2010.
[14] UNCTAD, Review of Maritime Transport 2009.

Chart 9: Growth of transportation services exports of selected Asian economies 2000-2008 (Index 2000=100)



Source: IMF and national data.

31. In **South and Central America,** Chile, the region's biggest transport services exporter recorded 16 per cent average annual growth. In particular, the country's exports of sea freight transportation services tripled over the period. Brazil's transportation services exports were, by comparison, more dynamic (18 per cent) due to growing receipts from sea freight transportation services as well as port services. In **North America**, the United States' and Canada's exports grew at a much slower path (8 per cent and 5 per cent respectively). In particular, in the United States, sustained growth of air freight transportation services exports could not compensate for the sluggish performance of air passenger transport services exports. Exports of air passenger transportation services represent the largest component of the United States total transportation services receipts.

32. Finally, between 2000 and 2008, in **Africa**, Egypt's exports of transportation services grew by per 15 cent mainly due to the increasing numbers of transiting ships in the Suez Canal, in net tonnage, as well as in the Canal's toll revenues. Morocco's exports, however, were more dynamic, recording an average annual increase of 23 per cent. In the **Middle East**, rising revenues from sea freight transportation services pushed Israel's exports up by 23 per cent.

33. In the period 2000-2008, <u>world imports of transportation services</u> increased by 12 per cent on annual average. With 27 per cent, the CIS recorded the most rapid growth, followed by the Middle East (19 per cent), Asia (13 per cent), and Europe (12 per cent). South and Central America and North America grew respectively by 11 per cent and by 7 per cent.

34. In North America, the United States, the second largest transport importer in the world, increased by 6 per cent. In South and Central America, Brazil's exports rose by 12 per cent on annual average. In 2008, the country accounted for over 20 per cent of the region's transport imports. Chile, the second biggest importer in South and Central America, recorded fast growth (15 per cent), thus increasing its share in the regions' imports from 11 per cent in 2000 to almost 15 per cent in 2008.

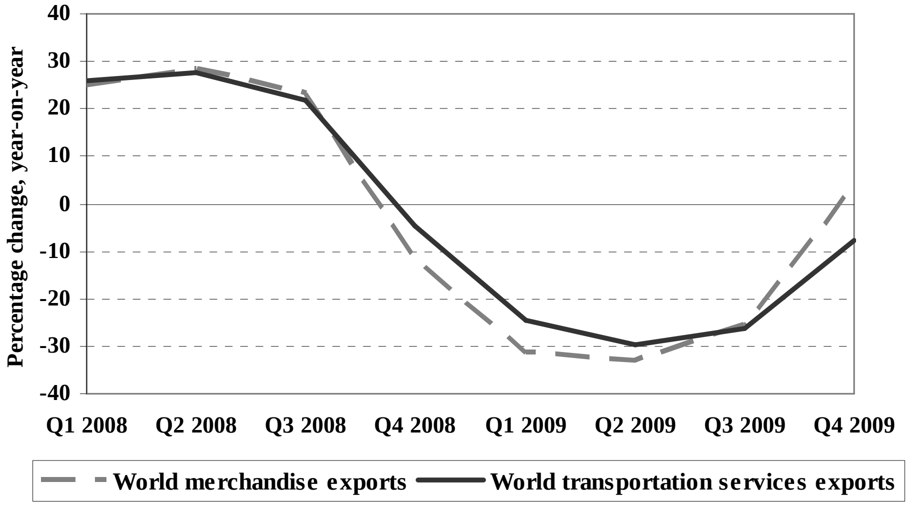
35. Europe's rise was largely due to the EU (27) (12 per cent), Norway (14 per cent) and Turkey (16 per cent). By comparison, Switzerland's transportation services imports lagged behind (6 per cent). In Asia, Japan recorded a slower growth by 6 per cent, while China increased by 22 per cent on annual average. In the CIS, the Russian Federation's imports increased by 24 per cent. However, growth was more pronounced in Ukraine (43 per cent).

36. In Africa, South Africa and Egypt, the largest importers, payments for transportation services rose respectively by 15 per cent and 16 per cent. In Middle East, rapid growth was recorded in the United Arab Emirates (24 per cent) and in the Kingdom of Saudi Arabia (27 per cent).

B. RECENT TRENDS (2009-2010)

37. Transport, along with finance, was the service sector most affected by the economic crisis. In 2009, world transportation services dropped by 23 per cent to US$700 billion reflecting a weaker demand for freight transport due to the sharp decline of merchandise trade. Air transported freight declined by 9 per cent and international passengers transport by 2 per cent.

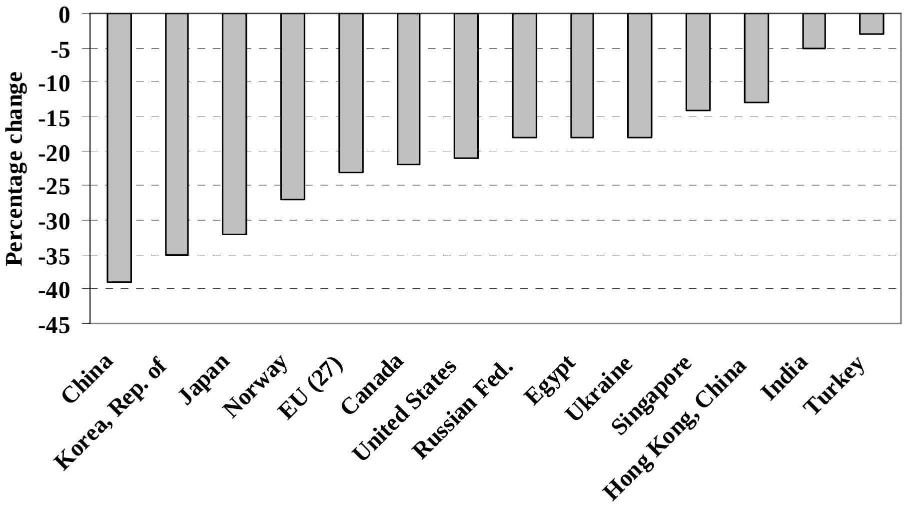
Chart 10: World exports of transportation services and world merchandise exports, Q1 2008 - Q4 2009 (Percentage change, year-on-year)



Source WTO estimates.

38. In 2009, Asia's exports plummeted by 26 per cent. In particular, China's exports of transportation services dropped by 39 per cent. Significant declines were also recorded by the Republic of Korea (-35 per cent) and Japan (-32 per cent). Exports of transport services from Europe were down by 22 per cent, with the European Union (27) recording -23 per cent and Norway -27 per cent. In North America, the United States transportation services receipts fell by 21 per cent. In the CIS, exports contracted by 17 per cent, with Russian Federation and Ukraine decreasing both by 18 per cent. In Africa, Egypt's exports declined also by 18 per cent.

Chart 11: Exports of transportation services of selected leading exporters, 2009
(Percentage change)

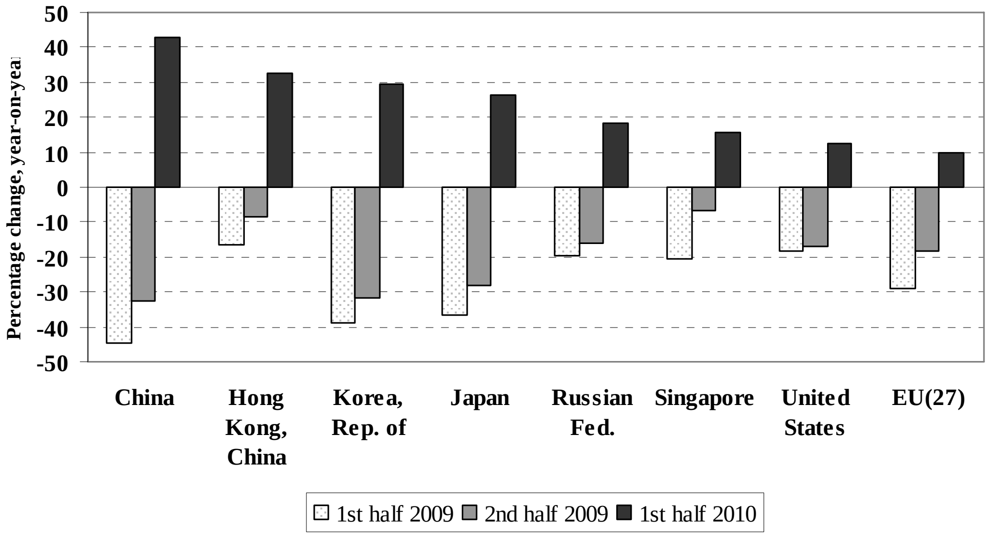


Source: IMF, Eurostat and national sources.

39. World imports of transportation services declined by 22 per cent to US$835 billion in 2009. All regions faced sharp declines. In Europe, imports fell by 24 per cent. However, the CIS was the most affected region with imports dropping by 31 per cent. In the Russian Federation and Ukraine, imports declined by 27 per cent while in Ukraine they collapsed (-51 per cent). North America's imports declined by 22 per cent and, in Asia, transportation services payments were down by 20 per cent. In the region, imports by Japan and China fell by 25 per cent and by 7 per cent respectively. In South and Central America, imports contracted by 24 per cent with Brazil's and Chile's imports dropping by 23 per cent and 28 per cent. Finally, in Africa and Middle East, imports decreased respectively by 16 per cent and 15 per cent.

40. Available data for the first months of 2010 point to a rapid rebound of the transportation services sector following global merchandise trade recovery. In particular, transportation services exports of Asian economies, which had dropped significantly in 2009, are recovering fast. In the first half of 2010, China's exports of transportation services increased by 43 per cent, compared to the same period of 2009. With over 40 per cent increase in the second quarter of 2010, the Republic of Korea's transport exports reached pre-crisis growth levels. In the case of Japan and Hong Kong, China, growth in the first six months of 2010 was even higher than in the first half 2008.

Chart 12: Exports of transportation services of selected leading exporters, first half 2009- first half 2010
(Percentage change, year-on-year)



Source: Eurostat and national sources.

41. By comparison, recovery was more gradual in other regions. In the first half of 2010, the United States' and the EU (27) exports of transportation services increased respectively by 12 per cent and 10 per cent year-on-year. In April 2010, the air transport sector suffered the consequences of the closure of the European airspace due to the presence of a volcanic ash cloud originating in Iceland. Around 75 per cent of European airlines' passenger operations were affected, 30 per cent of African airlines, and 20 per cent of the Middle Eastern. By comparison, the impact on other region's airlines was lower. European airlines recorded a drop by 13 per cent in international passenger traffic, with a trough of -18 per cent on intra-European routes.[15] According to preliminary estimates, airlines faced cumulative revenue losses for at least US$1.7 billion.[16]

C. TRENDS IN BILATERAL EXPORTS OF TRANSPORTATION SERVICES IN SELECTED ECONOMIES

42. Estimates based on data of available reporters (accounting for some 75 per cent of world exports of transportation services) indicate that, in 2008, almost two thirds of transportation services exported to the world were destined to developed economies. Around 34 percent were received by developing economies while the CIS accounted for only 2-3 percent.

43. According to available data in 2008, EU (27) exports to the United States, Switzerland, and China accounted overall for some 40 per cent of total extra-EU(27) transportation services exports. In 2008, in North America, one third of the United States' transport services exports took place with the EU(27). Exports to Japan and Canada followed at a distance with 9 per cent and 8 per cent respectively.

44. In Asia, transportation services exports appear to be more regional. In 2008, at least half or more of transportation services exported by several Asian economies were destined to other economies within the region. In 2008, Hong, Kong China was the largest export market for China accounting for nearly 36.7 per cent of total transportation services exports.[17] China was the first

[15] UNWTO World Tourism Barometer, Interim Update August 2010.
[16] IATA, "The impact of Eyjafjallajökull’s volcanic ash plume", May 2010.
[17] "China Trade in Services Report 2009", China's Ministry of Commerce.

destination of the Republic of Korea's exports of transportation services (19 per cent). The country' exports to other Asian partners accounted for more than the half of its transportation service exports. Japan's largest individual export partners were the United States and the EU(27), however, around half of its exports were destined to Asia. Similarly, 57 per cent of transportation services exported by Hong Kong, China reached other Asian economies.

D. OUTWARD FATS SALES (TRANSPORT AND STORAGE) IN SELECTED ECONOMIES

45. According to available information, in 2008, foreign affiliates of US firms, engaged in air, rail, water, and truck transportation as well as in support transport activities, sold services for a total amount of US$22.4 billion. No data are disclosed for services sold worldwide by US affiliates in the whole "transportation and warehousing" industry, only to some selected destinations. For example, total services sold by these affiliates in Europe totalled US$21.6 billion, while those in Latin America countries (including Mexico and the Caribbean) amounted to US$8.3 billion, and to Canada US$5.7 billion.

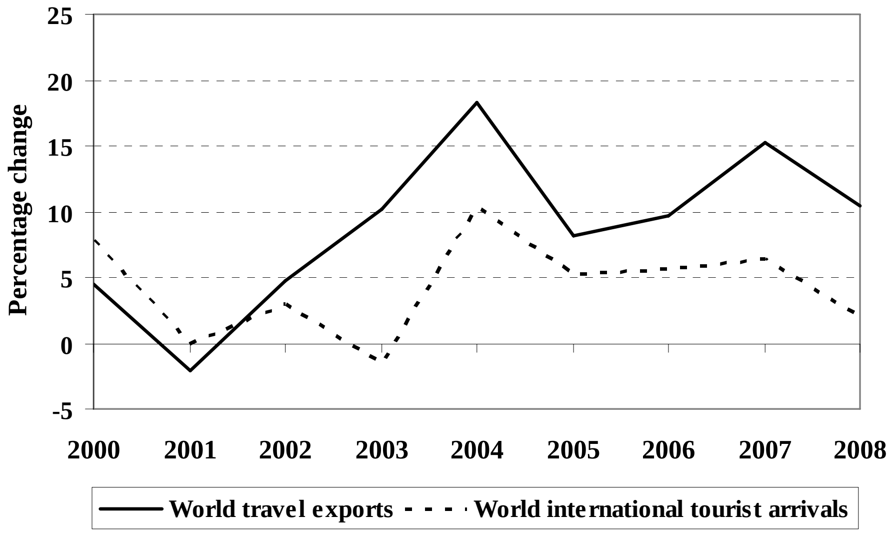
46. Moving to Europe, in 2008, total sales of German foreign affiliates, engaged in the transport and storage industry attained US$109.6 billion, of which more than 80 per cent came from foreign affiliates in supporting and auxiliary transport activities. Almost two thirds of the sales originated from affiliates located in EU(27) member countries, while those in the United States accounted for 8 per cent of the total. In France, the total turnover of foreign affiliates engaged in transport and storage sector was US$37.5 billion.

III. TRAVEL

A. TRADE DEVELOPMENTS BETWEEN 2000 AND 2008

47. In the last decade, the increasing availability of low-cost airlines to reach long-distance destinations, as well as the advent of e-commerce to purchase travel packages online has contributed to make international travel more affordable. According to the UNWTO, in the period 2000-2008, the number of world international tourist arrivals rose by 4 per cent on average per year. World travel exports increased by 9 per cent despite events such as the September 11 (2001), SARS (2003), the tsunami (2004), and the onset of a global economic crisis (2008).

Chart 13: World travel exports and international tourist arrivals, 2000-2008
(Percentage change)



Source: WTO estimates and UNWTO.

48. Between 2000 and 2008, travel export growth was pronounced in the CIS (20 per cent), Africa (14 per cent) and Asia (12 per cent). Europe's exports rose by 9 per cent, while North America lagged behind (4 per cent). In South and Central America, recorded growth was by 8 per cent on annual average.

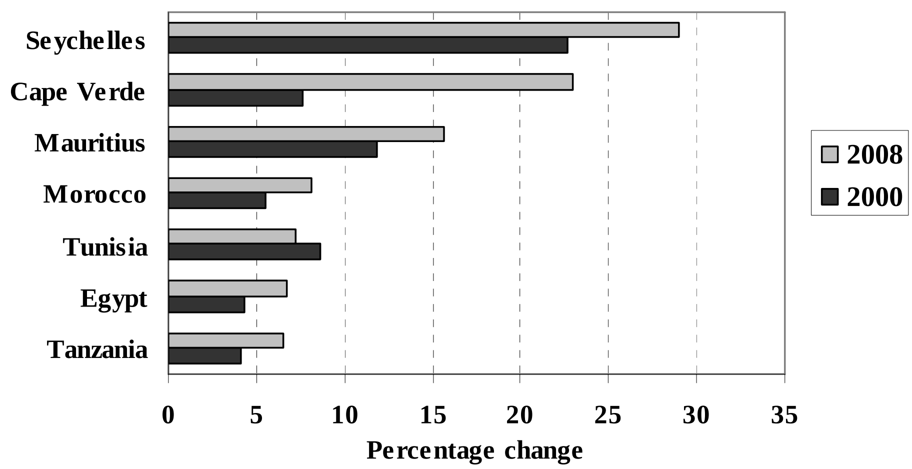
49. In **Europe**, which accounted in 2008 for 47 per cent of world travel exports, tourism developed rapidly in many countries. Croatia's travel exports rose by 19 per cent on average per year. As a result, in 2008, Croatia doubled its share in world travel exports and ranked among the fifteen leading travel exporters. Turkey's travel receipts increased by 14 per cent due to the higher number of foreign tourist arrivals, mainly from Europe. In the **CIS**, the most dynamic region, the Russian Federation travel exports rose by 17 per cent on average per year. Record period growth were recorded in Ukraine (40 percent) and in the Kyrgyz Republic (55 per cent).

50. In **North America**, the United States' travel receipts grew only by 4 per cent due to the modest increase in international tourist arrivals (2 per cent) over the period. In Mexico, growth was more dynamic (6 per cent). Despite the excellent travel exports growth recorded in Brazil (19 per cent), **South and Central America**'s travel receipts resented the weak performance of the Caribbean (5 per cent) due to moderate rise in international tourists. In 2008, the Caribbean accounted for 38 per cent of the region's travel exports.

51. In the period 2000-2008, the value of Africa's travel exports almost tripled and, starting in 2005, it exceeded the region's receipts from exports of agricultural products. Over recent years, the number of international tourist arrivals to Africa rose steadily. In 2008, over 44 million international tourists visited African countries, up by 7 per cent since 2000. Egypt, the largest travel exporter in the region, has recently started to develop new tourism areas such as safari, health-related, and conference tourism. Health-related tourism is well developed in Tunisia. The country' exports of this type of services increased by 26 per cent on average per year since 2000.

52. Travel receipts play an important role in several African economies. The ratio of travel exports to GDP has grown in many African countries since 2000. In leading travel exporters such as Egypt and Morocco, it has increased by 3-4 percentage points. In Cape Verde, the contribution of the emerging tourism sector to GDP has risen from 8 per cent in 2000 to 23 per cent in 2008. In the Seychelles, the latter reached almost 30 per cent in 2008.

Chart 14: Ratio of travel exports to GDP in selected African countries, 2000 and 2008
(Percentage change)



Source: World Bank and IMF.

53. In **Asia,** Australia's travel exports increased by 13 per cent on average per year, and in 2006, the country became the fourth-largest world exporter of travel, the second in Asia behind China. Australia's education-related travel has gradually become the most important service category exported by the economy, accounting for more than half of the country's total travel exports in 2008. However, in Asia the strongest period growth was recorded in Macao, China. Between 2000 and 2008, the economy's travel receipts have been increasing by 24 percent on average per year due to its increasing attraction as gaming location.

54. In the **Middle East**, the United Arab Emirates' travel exports grew by 27 per cent annually over the period. The Emirates have become a very important tourism destination in the region. In the period 2000-2008, Jordan's travel receipts quadrupled as the country's cultural an historical heritage attracted an increasing number of foreign tourists, mainly from Europe.

55. In the period 2000-2008, world travel imports increased by 9 per cent on average per year. The CIS recorded the most rapid growth increasing by 15 per cent, followed by Europe and Asia (both by 9 per cent). In South and Central America travel imports rose by 8 per cent.

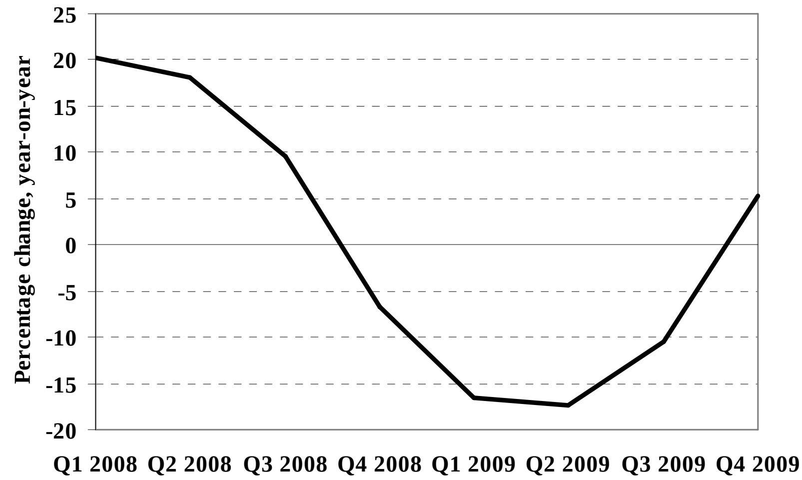
56. Similarly to travel exports, North America's growth was slower (5 per cent) due to the United States' sluggish import performance (3 per cent). In South and Central America, Brazil, the largest travel importer in the region, grew by 14 per cent on annual average. By contrast, Argentina's imports stagnated. In Europe, imports by the EU (27) and by Switzerland rose by 9 per cent. Growth was faster in Norway (17 per cent). In Asia, China's travel imports increased by 14 per cent.

57. In the CIS, the Russian Federation's travel expenditure increased by 13 per cent on average per year. However, travel payments rose faster in other economies in the region such as Ukraine (31 per cent), Armenia (30 per cent), and the Kyrgyz Republic (45 per cent). In Africa, South Africa's and Egypt's travel imports grew respectively by 10 and 13 per cent. In Middle East, the United Arab Emirates' imports expanded by 20 per cent.

B. RECENT TRENDS (2009-2010)

58. In 2009, the worsening of global economic conditions following the financial crisis sharply reduced the demand for tourism services. Both business and leisure travel were cut. In general consumers tended to prefer closer destinations and diminished the length of stay and/or their expenditure abroad. In 2009, world travel exports decreased by 9 per cent to US$870 billion reflecting the worldwide drop in international tourist arrivals (-4 per cent). Export decline was pronounced in Europe (-13 per cent), North America (-11 per cent) and the CIS (-22 per cent). In South and Central America, the decrease was by 6 per cent. By comparison, African and Asian economies were overall less affected, decreasing by 5 per cent and 3 per cent respectively. The Middle East was the only region to show positive growth (2 per cent).

Chart 15: World travel exports, Q1 2008-Q4 2009
(Percentage change, year-on-year)



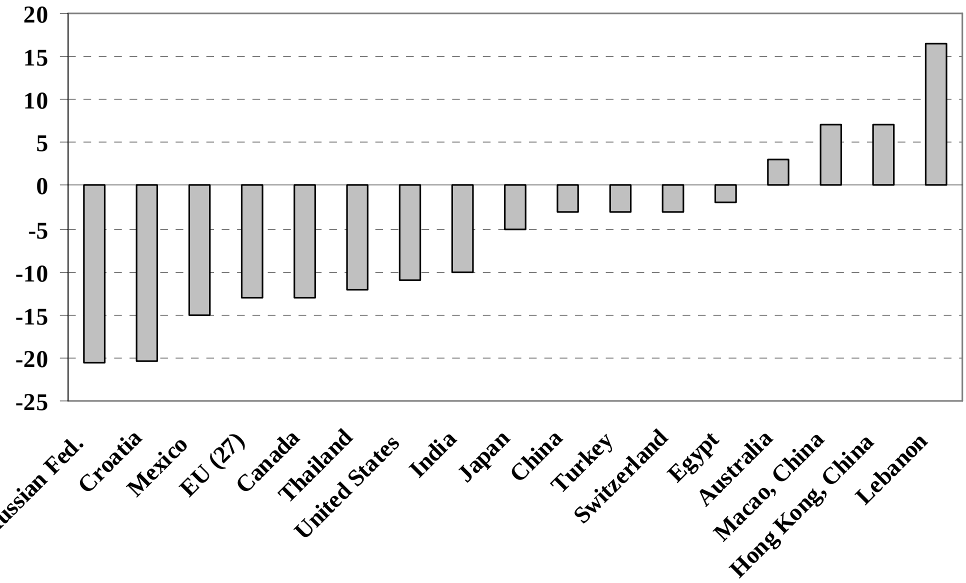
Source: WTO estimates.

59. In **Europe**, EU(27) travel exports were down by 13 per cent, although the impact of the crisis varied significantly among individual EU (27). In Croatia, largely dependent on tourist arrivals from the EU (27), travel receipts contracted by 20 per cent. Within Europe, positive growth was recorded only in Albania (7 per cent) due to the increase in both the number and expenditure of foreign travellers, originating mainly from neighbouring economies.

60. In **North America**, Mexico's travel exports declined by 15 per cent affected by both the unfavourable economic environment and the spreading of the A flu (H1N1 influenza). According to the World Tourism Organization, international tourist arrivals to Mexico declined by 19 per cent year-on-year in the second quarter of 2009, when the epidemic was at its peak. Despite the favourable dollar exchange rate, the number of foreign travellers to the United States contracted (-9 per cent). As a result, the country's travel receipts fell by 11 per cent. In the **South and Central American region**, Central American countries resented at most the decline in tourist inflows following the economic crisis. According to the UNWTO, international tourist arrivals to these countries decreased by 7 per cent in 2009, compared to 2-3 per cent in South America economies and in the Caribbean.[18] Ecuador, El Salvador, Honduras recorded a drop on travel export by more than 20 per cent in 2009.

[18] UNWTO World Tourism Barometer, Interim Update August 2010.

Chart 16: Exports of selected leading travel exporters, 2009
(Percentage change)



Source: IMF, Eurostat and national sources.

61. In 2009, the **CIS** travel receipts plummeted by 22 per cent due to a substantial drop in exports from the two major exporters in the region. The Russian Federation's and Ukraine's travel exports declined by 21 per cent and by 38 per cent respectively reflecting the decrease in foreign tourists, particularly from non-CIS countries. Despite the negative economic context, Azerbaijan's travel exports increased by an impressive 84 per cent due to the higher number of travellers visiting the country, an important part for business reasons.

62. **Asian economies** were, on average, less affected by the crisis. In 2009, China's travel receipts decreased by 3 per cent and Japan's by 5 per cent. Among the largest exporters in the region, India's travel receipts declined by 10 per cent. Receipts from foreign students' expenditure and high revenues from gaming activities continued to keep Australia and Macao, China's travel exports positive (3 per cent and 7 per cent respectively). However, the decline in international travel exports was dramatic for small islands such as the Maldives (-8 per cent) and Fiji (-27 per cent), heavily dependent on tourism revenues. In Viet Nam, exports decreased by 22 per cent.

63. The **Middle East** was the region least touched by the crisis. In 2009, the region's travel receipts increased by 2 per cent following significant expansion in Lebanon's travel exports (16 per cent). The country has recently become an important tourism destination in the region. The United Arab Emirates and the Kingdom of Saudi Arabia also recorded positive growth. In **Africa,** Egypt's travel exports decreased only by 2 per cent in 2009, while in Morocco and Tunisia the decline was more pronounced (-8 per cent and -7 per cent respectively). If larger travel exporters in the region coped better with the consequences of the crisis, small island economies were severely hit. In 2009, Mauritius and Seychelles' travel exports fell by 23 per cent, and in Cape Verde the decline was by 18 per cent.

64. In 2009, world travel imports declined by 9 per cent to US$790 billion. European countries resented at most the consequences of the economic crisis, with imports contracting by 14 per cent. However, while the EU (27) imports dropped by 15 per cent, Switzerland's decreased only by 1 per cent. In the CIS, travel imports contracted by 12 per cent. In the region, the Russian Federation and Ukraine decreased by 13 per cent and 17 per cent respectively. North America's travel imports

declined by 9 per cent, with the United States decreasing by 8 per cent. In South and Central American countries, imports decreased only by 1 per cent following Brazil's and Argentina's very modest increases.

65. Although Asia's overall imports stagnated in 2009, China's travel payments recorded double-digit growth (21 per cent), while Japan's travel imports rose by 6 per cent. The Middle East was the only region to record positive growth due to the Kingdom of Saudi Arabia's imports expanding by 24 per cent. However, this increase was offset by the United Arab Emirates' travel payments dropping by 22 per cent. Finally, in Africa imports contracted by 9 per cent, with the largest travel importers, South Africa and Egypt, decreasing by 6 per cent and 13 per cent respectively.

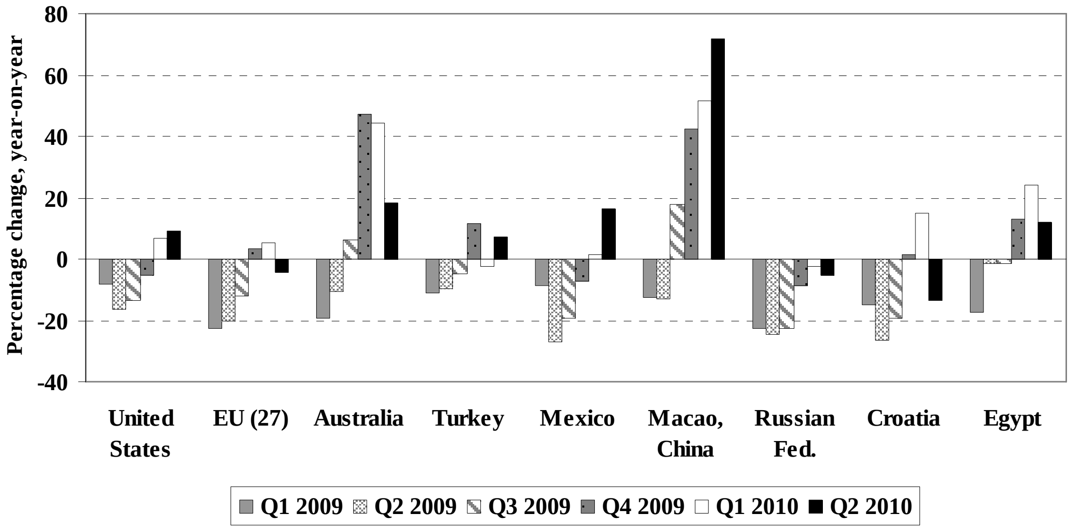
66. World tourism recovery started in the third quarter of 2009 and is going rapidly. According to the UNWTO, in the first half of 2010, the number of international tourists rose by 7 per cent year-on-year. The forecast for the end of 2010 is an increase in world international tourist arrivals by 3-4 per cent.

67. Preliminary figures of leading travel exporters confirm this upward trend. In the first half of 2010, international travellers' expenditure in the United States increased by 8 per cent year-on-year. In the same region, Mexico's exports were up by 7 per cent. In Europe, EU (27) travel exports rose by 5 per cent in the first quarter of 2010. However, they declined by almost 5 per cent in the second quarter due the negative effects of the volcanic ash cloud on international tourist arrivals. Northern European countries were particularly affected. According to preliminary estimates, in April 2010, the number of international tourist arrivals to the United Kingdom dropped by 11 per cent and to Iceland by 14 per cent.

68. In Africa, in the first half of the year, Egypt's travel exports grew by 18 per cent while Morocco's rose by around 10 per cent. By contrast, Tunisia's travel exports were down by 2 per cent, as result of the 12 per cent drop in the number of international tourists to the country in April following the closure of the European airspace. Most international tourists in Tunisia originate from Europe. In the CIS, while Ukraine's travel exports rose by 5 per cent in the first six months of 2010, the Russian Federation's travel receipts continued to record negative growth (-4 per cent).

69. According to the UNWTO, Asia's tourism sector experienced a very dynamic rebound. In the first half of 2010, international tourist arrivals to the region were up by 14 per cent year-on-year. In this period, for example, China saw the number of foreign tourists increase by almost 13 per cent and its travel exports rise by 20 per cent year-on-year. While Australia and Macao, China continued their escalating export growth, travel receipts recovered also in small islands. The Maldives' travel exports are estimated to grow by 14 percent by the end of 2010.

Chart 17: Travel exports of selected leading travel exporters, Q1 2009 – Q2 2010
(Percentage change, year-on-year)



Source: Eurostat and national sources.

C. TRENDS IN BILATERAL FLOWS OF TRAVEL EXPORTS IN SELECTED ECONOMIES

70. According to data of available reporters representing 68 per cent of world travel exports, in 2008, 73 per cent of total travel receipts were destined to developed economies, with developing accounting for 25 per cent and the remaining 2 per cent to CIS. In 2008, over 20 per cent of international travellers' expenditure in the EU(27) (excluding intra-EU transactions) originated from the United States. Similarly, with a share of 27 per cent, the EU(27) was the first destination of the United States' travel exports. Travel exports have a more distinct regional dimension in Asia. Over 60 per cent of China's travel receipts were concentrated in the Asian region, in particular Hong Kong, China, Chinese Taipei, the Republic of Korea and Japan.[19] More than two-thirds of the Republic of Korea's travel exports were destined to other Asian countries with over 30 per cent to Japan. In the case of Hong Kong, China the share of Asia is even higher (over 84 per cent), with China as first partner. Asian economies accounted for around 77 per cent of Japan's travel exports in 2008, and 60 per cent of Australia's travel receipts. In reporting Asian economies, travel exports to the EU(27) represented between 6 to 9 per cent of the total, while the share of the United States ranged between 5 and 12 per cent (Republic of Korea).

D. OUTWARD FATS SALES (HOTELS AND ACCOMMODATION) IN SELECTED ECONOMIES

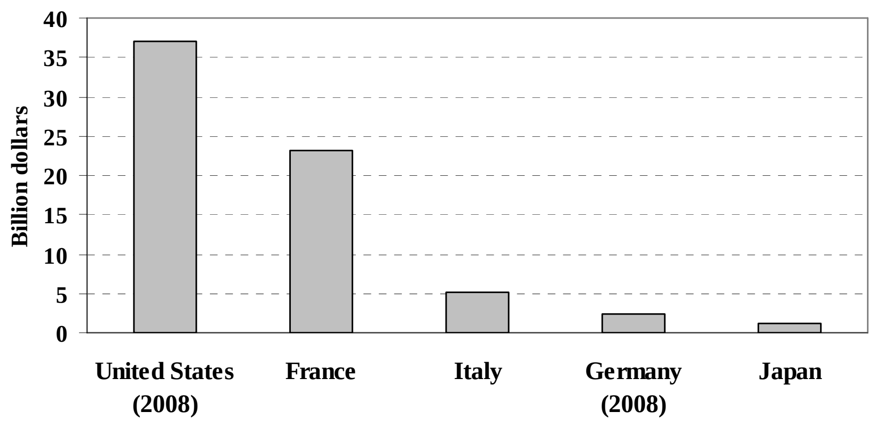
71. In 2008, services supplied by US foreign affiliates engaged in accommodations and food services reached US$37 billion. Around 56 per cent were generated by affiliates established in European countries, mainly in the United Kingdom and France. Canada accounted for 4 per cent of total sales and Latin America (including Mexico and the Caribbean) for 5 per cent. The total services sold abroad by U.S. affiliates in travel arrangement and reservation services totalled US$5.5 billion, of which almost 60 per cent generated by affiliated located in the Netherlands.

72. According to available data, in 2007, the total sales of French affiliates engaged in the hotels and accommodations sector reached over US$23 billion. In the same year, Italian affiliates totalled US$5.2 billion while affiliates of Germany's firms in 2008 reached US$2.4 billion. More than half of

[19] "China Trade in Services Report 2009", Ministry of Commerce of China.

the sales for the three economies above was generated by affiliates located outside the EU (27). In Asia, Japanese affiliates totalled US$1.2 billion dollars.

Chart 18: Services supplied (United States) and sales of foreign affiliates engaged in the Hotels and Accommodations sector abroad for selected economies (outward FATS), 2007 and 2008.

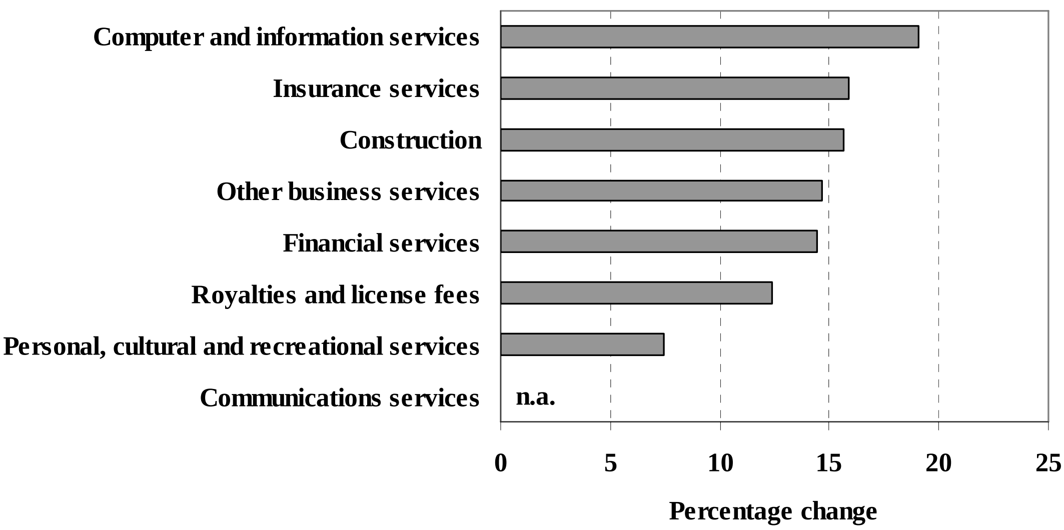


Source: Eurostat and U.S. BEA.

IV. OTHER COMMERCIAL SERVICES

73. With an average annual increase by 15 per cent, "other commercial services" was the most dynamic export sector in the period 2000-2008. However, the performance of the different sectors forming this aggregate category varied significantly. The most rapid growth was recorded in computer and information services (19 per cent), insurance services (16 per cent) and construction (16 per cent). By comparison, world exports of personal, cultural and recreational services increased only by 7 per cent. A detailed analysis by individual sector follows in the next sub-sections.

Chart 19: Growth of other commercial services by sector, 2000-2008
(Percentage change)



Source WTO estimates.

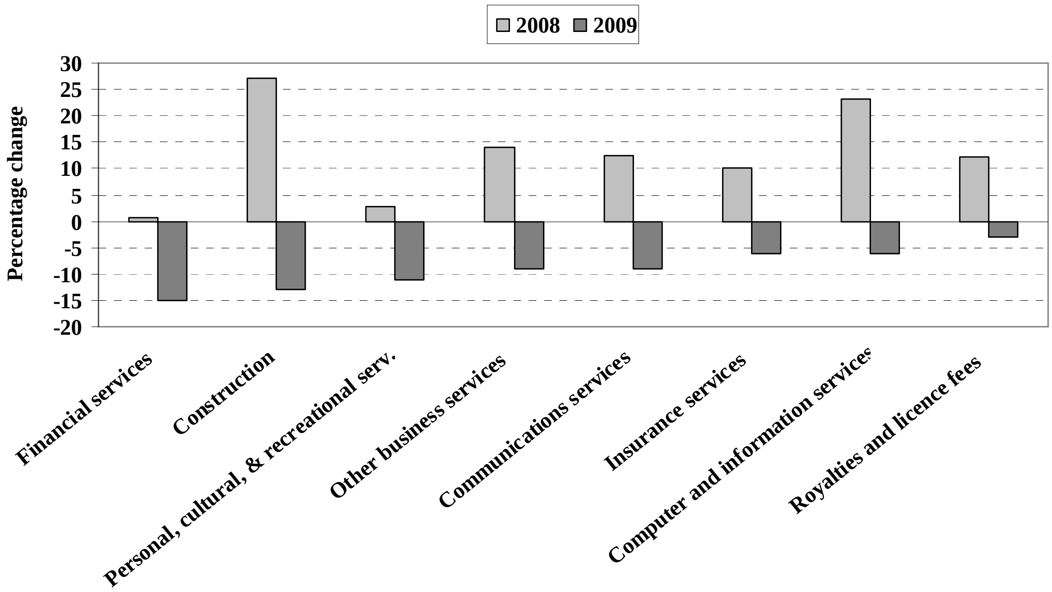
74. Between 2000 and 2008, the CIS exports of other commercial services grew rapidly (29 per cent) following strong growth, in particular, of other business services, construction, and computer services. Europe followed at a distance (16 per cent) driven especially by expanding exports of other business services, financial services, and computer and information services. A similar trend was observed in Asian and South and Central American economies' exports, which increased by 15 per cent on average per year. In North America, recorded growth was by 10 per cent, led by other business services, royalties and licence fees and financial services exports.[20]

75. World imports of other commercial services increased by 13 per cent annually in the period 2000-2008. The CIS recorded the most rapid growth (25 per cent), with several economies, such as the Russian Federation and Kazakhstan, increasing by around 30 per cent. In Europe, imports of other commercial services rose by 14 per cent. Asia followed with an average annual increase by 12 per cent. However, within the region, countries' performance varied. While China increased by 25 per cent, in Japan growth was slower (7 per cent). In South and Central America, Brazil's imports expanded more rapidly (15 per cent) than the region’s average (11 per cent). North America's imports rose by 10 per cent driven by the United States' fast growth of other business services and of insurance services. In Africa, Morocco and South Africa's imports grew by 19 per cent Finally, in the Middle East, the United Arab Emirates' payments for other commercial services rose on average by 24 per cent.

76. In 2009, world exports of other commercial services fell by 9 per cent to US$1780 billion. All individual services sectors were affected by the global economic crisis but not to the same extent. Turmoil in the financial markets resulted in world exports of financial services collapsing by 15 per cent. Construction, which had recorded the most rapid growth in 2008, dropped by 15 per cent. World exports of other business services, and of communications services decreased each by 9 per cent. However, some sectors were more resilient than others to the adverse economic context. World exports of computer and information services as well as global receipts of royalties and licence fees decreased by 6 per cent and 3 per cent respectively.

[20] Due to the presence of breaks in series, it is not possible to provide the average period growth for Africa and the Middle East.

Chart 20: World exports of other commercial services by category, 2008-2009
(Percentage change)



Source: WTO estimates.

77. Due to their different export structure, the impact of the economic crisis varied also across regions. Declines of exports of other business services as well as construction translated into an overall 15 percent exports fall in the CIS. In Europe the decline was also pronounced (-11 per cent), due to the sharp drop of financial services, which accounted in 2008 for over 9 per cent of the region's total commercial services exports. In African economies, the decline was also by 11 per cent. Asia's exports of other commercial services contracted by 8 per cent.

78. By contrast, positive growth of computer and information services, insurance services, and other business services in the United States resulted in North America's exports decreasing only by 5 percent. South and Central America's exports fell by 4 per cent thanks to strong exports of computer and information services and a modest recovery of financial services. However, in 2009, the Middle East was the only region where exports of other commercial services exports stagnated rather than declined. This was due to the Kingdom of Saudi Arabia's doubling exports of financial services.

79. In 2009, world imports in other commercial services contracted by 6 per cent to US$1520 billion. By comparison with transport and travel, other commercial services imports were overall more resilient. Africa's and CIS imports of other commercial services were severely affected by the economic crisis, dropping respectively by 20 per cent and 19 per cent. In the Middle East the decline was by 12 per cent while in Europe imports decreased by 7 per cent. North American and Asian economies' imports decreased respectively by 4 per cent and 3 per cent. South and Central America was the only region with positive growth (3 per cent).

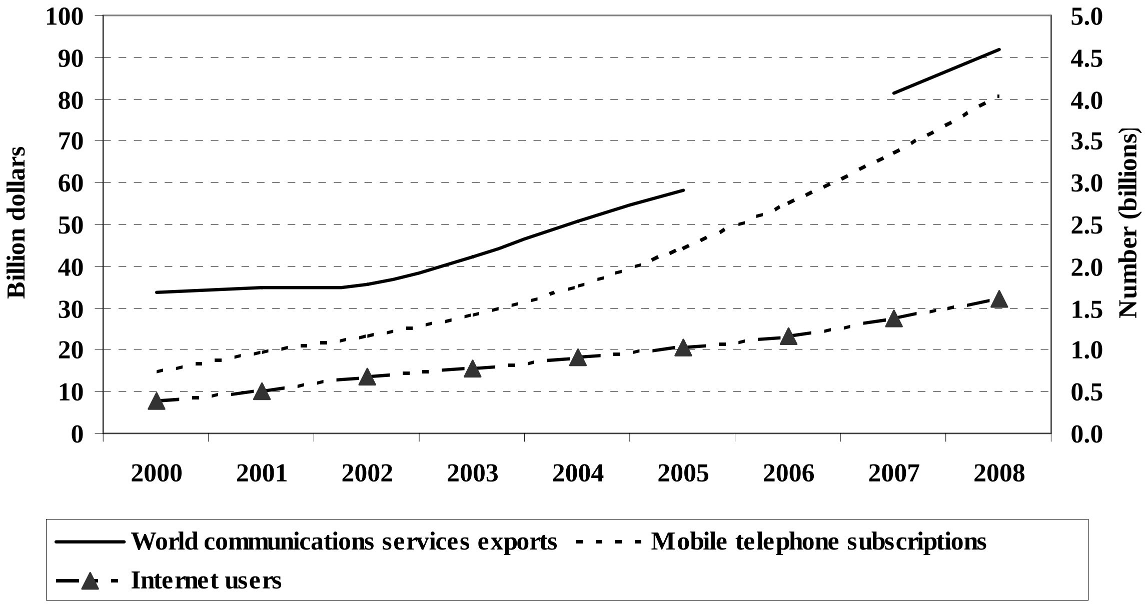
A. COMMUNICATIONS SERVICES

1. Exports Developments Between 2000 and 2008

80. Fuelled by rapid technological progress, the communications sector, in particular telecommunications, has benefited of a remarkable growth over recent years. According to the ITU, between 2000 and 2008, worldwide mobile cellular subscriptions increased by 24 per cent while the number of Internet users grew by 19 per cent. By the end of 2008, there were more than 4 million

mobile telephone subscribers in the world and some 1.6 billion people using the Internet. In the meantime, average international call prices have declined significantly.

Chart 21: World exports of communications services and world mobile telephone subscriptions and Internet users
(Billion dollars and billion numbers)



** Break in series for world communication services exports in 2006.*
Source: WTO estimates and ITU.

81. Although a break in series does not allow providing a precise measure of the average period growth, world exports of communications services, covering to a very large extent telecommunications services, increased considerably. Postal and courier services exports have also expanded fast, rising by 17 per cent on average between 2000 and 2008[21].

82. In **Europe**, which accounts half of the world's communications services exports, the recorded increase was by 15 per cent. In some EU (27) member countries in Eastern Europe growth was by 25-30 per cent annually. The United States accounted for 27 per cent of extra-EU (27) telecommunications services exports, followed by Switzerland (10 per cent) and Norway (5 per cent). According to the ITU, in 2008, in Europe there were fewer inhabitants than mobile cellular subscriptions and 60 per cent of all households had an Internet access, mainly through broadband. The highest penetration rates of Internet broadband subscribers were in Scandinavian and northern countries.

83. In the **CIS**, communications services exports grew by 16 per cent led by expanding exports of the Russian Federation. Almost two-thirds of the Russian Federation's telecommunication services exports were destined to the EU (27) and the United States. Other CIS countries accounted for 25 per cent. Similarly to Europe, in CIS countries, in 2008, the number of mobile subscriptions exceeded the number of inhabitants.

[21] Based on data available for 46 economies. It should be noted, however that for the United States statistics cover only postal services as data on courier services are included under air transport freight. In 2008, United States' exports of air transport freight was estimated at US$13 billion.

84. Break in series affect data for **North America**. However between 2006 and 2008, the region's communication service exports rose by 10 per cent, with the United States, the second largest world exporter, growing by 13 per cent. In **South and Central America**, communications services exports recorded 7 per cent growth but performance varied among sub-regions. While in Central America the average increase was by 11 per cent, in South American countries, exports increased at a slower path (7 per cent), despite Brazil's excellent performance of 38 per cent. In the Caribbean, exports declined by 3 per cent over the period.

85. Moving to the **Middle East**, in 2008, Kuwait became the third world's leading telecommunication services provider. Between 2004 and 2008, the country's exports of telecommunications services increased by 47 per cent on average per year. In 2008, Kuwait connected more than 40 million mobile subscribers in Sub-Saharan Africa and neighbouring Middle Eastern countries.

86. Compared to other regions, in **Asia,** communications services export growth was slower (8 per cent). However, In India, the largest communications services exporter in Asia, exports were very dynamic, increasing by 19 per cent. In China, communications exports (telecommunications) increased only by 2 per cent over the period due to an initial sluggish growth. Since 2000, in China mobile telephone subscriptions and Internet users, mainly broadband, went up respectively by 29 per cent and 38 per cent on average per year. China's telecommunications services exports were concentrated to the United States (first partner), Hong Kong, China, the EU (27) and Japan. Overall, these countries accounted for more than 70 per cent of the total.

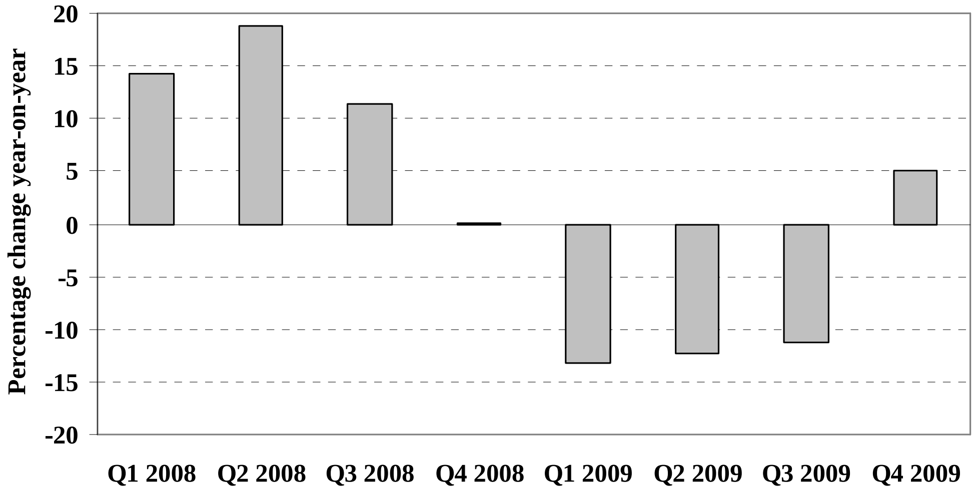
87. Between 2000 and 2008, **Africa**'s exports of communications services rose by 23 per cent boosted by rapidly expanding mobile telephony in both Northern and Sub-Saharan Africa.[22] In Egypt, the largest exporter, exports grew by 23 per cent, in Kenya by 45 per cent, and in Morocco by 24 per cent annually. According to the ITU the number of mobile telephone subscriptions rose by 45 per cent on average per year in African countries since 2000. However, the region still lagged behind in terms of access to the Internet, especially broadband. By the end of 2008, only 4 per cent of African people used the Internet, compared to 56 per cent of Europeans.

2. Recent trends (2009-2010)

88. Compared to other services sectors, at the world level, the communications sector (telecoms) has resented somewhat less the economic crisis with the global market for mobile cellular connections in continuing demand, especially in emerging economies, and a robust worldwide demand for Internet broadband services.

[22] Based on available data of 27 leading African exporters.

Chart 22: World exports of communications services Q1 2008 - Q4 2009
(Percentage change, year-on-year)



Source: WTO estimates

89. In 2009, world communications services exports, accounting for 2 per cent of total commercial services exports, decreased by 9 per cent to US$90 billion. **Asia**'s exports declined by 13 per cent due to India and China's falling exports. In 2009, in the two economies exports fell by 42 per cent and 24 per cent respectively. Preliminary data for the first half of 2010 suggest a continuation of this downward trend (-33 per cent for India, and -9 for China). According to the ITU, India and China alone are expected to add over 300 million mobile cellular subscriptions in 2010.

90. In 2009, in **Europe** and **North America**, exports declined by 9 per cent and 4 per cent respectively. In the first half of 2010, the United States telecommunications services exports rose by 7 per cent compared to the same period of 2009. EU (27) communications exports increased by 4 per cent in the same period. In **South and Central American countries** the average decrease was by 14 per cent, with Brazil recording, however, a drop by 24 per cent. In the period January-August 2010, Brazil' exports rose by 25 per cent year-on-year.

91. Although the Russian Federation's exports decreased by 10 per cent in 2009, the **CIS** was the only region to record positive growth (1 per cent). This was due mainly due to Ukraine's exports increase by 54 per cent. According to preliminary estimates, the economy's exports rose by 30 per cent in the first quarter of 2010 year-on-year.

92. By the end of 2010, there will be 5.3 billion mobile cellular subscriptions worldwide and the number of Internet users will surpass the two billion mark, of which 1.2 billion will be in developing countries. The total number of SMS sent globally tripled in the last three years reaching 6.1 trillion in 2010, generating an estimated revenue of US$812,000 every minute. However, while the cost of mobile telephony has dropped significantly in all countries, according to the ITU, high-speed fixed broadband Internet access is still unaffordable in many developing countries.[23]

3. Outward FATS sales (Post and telecoms) in selected economies

93. In 2007, the total sales of Germany's foreign affiliates in the postal and telecoms industry reached US$68.2 billion, increasing by 15 per cent on average since 2005. Around 60 per cent of total turnover originated by affiliates engaged in telecoms. In the same year, French foreign affiliates

[23] ITU, "ICT Facts and figures - The World in 2010".

totalled US$57. 7 billion sales. In 2008, U.S. foreign affiliates engaged in wired and wireless telecommunications services (except satellite) sold services abroad for US$18.9 billion, the vast majority destined to European countries.

B. CONSTRUCTION

1. Exports Developments Between 2000 and 2008

94. Between 2000 and 2008, construction was one of the most rapid growing service sectors, rising by 16 per cent on average per year, with a peak of 27 per cent in 2008.[24] Fast growth went along with a change in the regional structure of world exports. In 2000, **European countries**, mainly EU (27) members, exported some 63 per cent of the world's total construction exports. In 2008, Europe's share had gradually decreased to some 55 per cent under the pressure of rising exports from Asia and the CIS.

95. **Asia**'s construction exports increased by 17 per cent led by China's growing exports (43 per cent). By the end of 2008, China accounted for one third of Asia's total construction exports and 11 per cent of the world's total exports (compared to 2 per cent in 2000). Chinese building companies were engaged in the construction of electric power plants, oil pipelines, housing, and other infrastructure projects in African and Asian countries. Japan, the largest construction exporter in the region, recorded, by comparison, an average annual export growth of 11 per cent. Japanese firms operated the Middle East, undertaking a number of projects in the United Arab Emirates and the Kingdom of Saudi Arabia to meet local demand for infrastructure, hotels, residential and industrial buildings. In 2008, exports to these economies represented more than 38 per cent of Japan's total construction receipts. Exports to other Asian countries (especially Thailand, Indonesia and Singapore) accounted for some 25 per cent.

96. In the period 2000-2008, the **CIS**' exports of construction rose by 43 per cent on annual average due to the Russian Federation's escalating exports (51 per cent). As a result, the economy's share in world construction exports rose from less than 1 percent in 2000 to over 5 per cent in 2008. Russian construction companies were particularly active in building oil production facilities and hydro power plants abroad. In 2008, 41 per cent of construction work was carried out in EU (27) countries, (mainly Cyprus and Germany), and 20 per cent in Turkey. Exports to other CIS countries accounted for an additional 10 per cent.

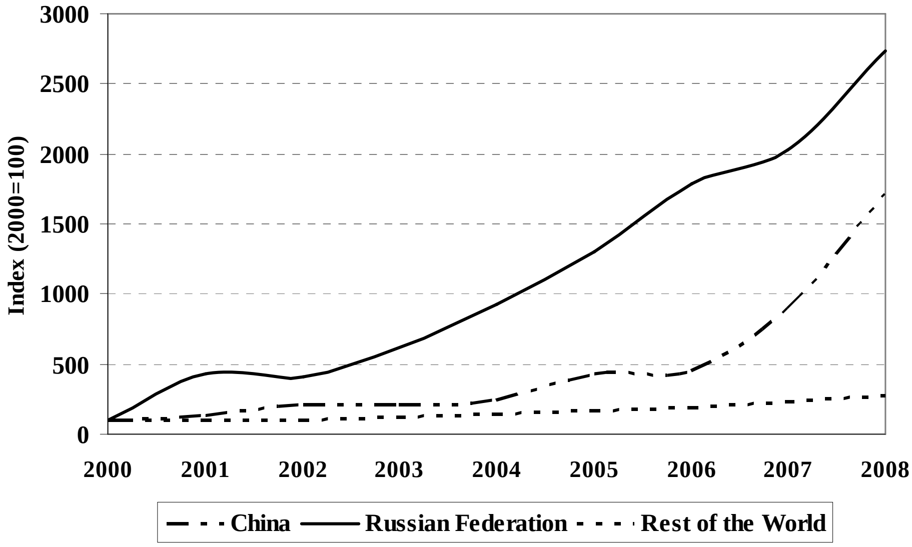
97. **North America**'s export series are affected by a break in series, however, available data for 2008 indicate that its contribution to world construction exports was very fairly small (2 per cent in 2008).[25] Similarly, exports originated from **South and Central America** were negligible.

---

[24] In BOP statistics, the category "construction" represents an exception, as by its own nature construction work is mainly supplied internationally through a commercial presence abroad. According to international guidelines, "smaller" project works (e.g. generally taking less than one year) are recorded in BOP statistics. Larger-scale projects, which last more than one year, such as those for building transport infrastructure, will be covered by the FATS framework. Some economies record all their international construction business in the BOP.

[25] It should be noted, however, that the United States' data for construction exports are published net of merchandise exports and net of outlays for wages, services, materials, and other expenses in the economy where the construction is taking place.

Chart 23: Growth of construction exports in China, Russian Federation and the rest of the world, 2000-2008 (Index (2000=100)



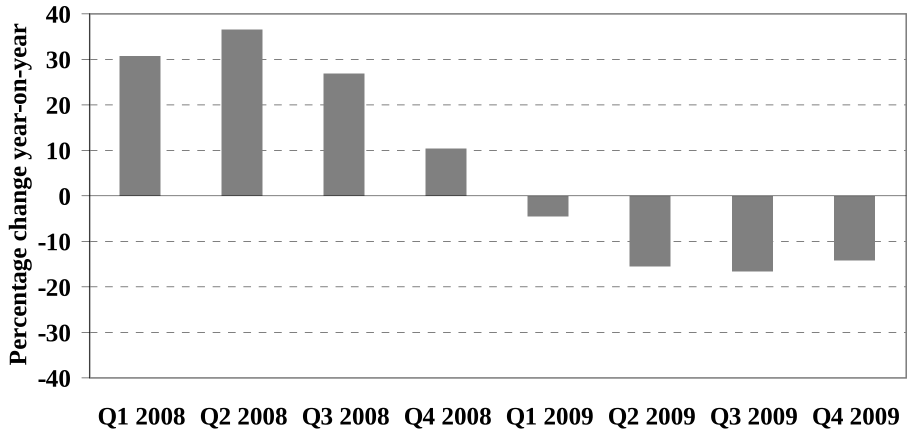
Source: IMF and WTO estimates.

2. Recent trends (2009-2010)

98. It is argued that the construction sector usually reacts to economic downturns with a delay, given that most contracts are long-term, running for two to three years or more, and the presence of backlogs over several years, allows contractors to mitigate the effect of a crisis in the short run.[26] A quarterly analysis of the effect of the recent financial crisis on world construction exports appears to confirm this vision. While trade in other services sectors started to contract immediately in the last quarter of 2008, world construction exports continued to record a growth of 11 per cent. The effect of the recession started to show up only gradually in the first months of 2009. However, by the end of the year, world exports of construction declined by 13 per cent to US$80 billion and construction was the most affected service sector just after transport and finance.

[26] See document S/C/W/302, page 5.

Chart 24: World exports of construction, Q1 2008 - Q4 2009
(Percentage change, year-on-year)

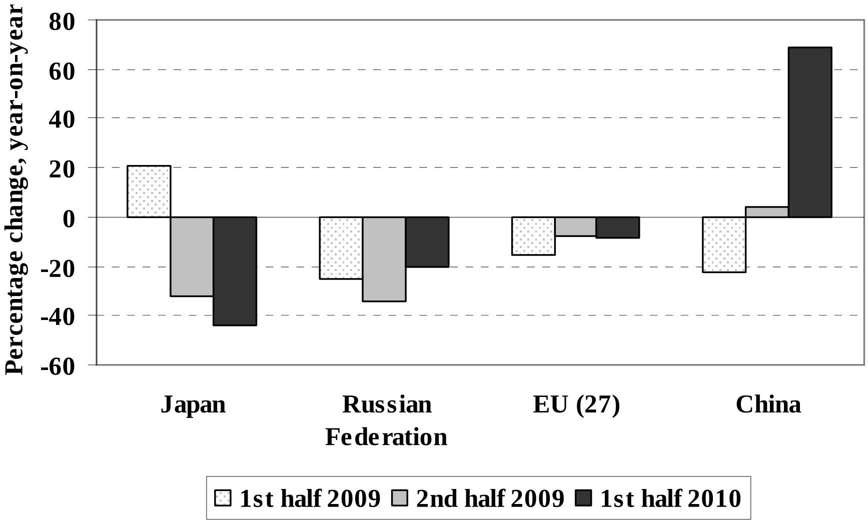


Source: WTO estimates.

99. In the CIS, the Russian Federation's construction exports, which had increased by 35 per cent in 2008 dropped by 30 per cent in 2009. In other regions, recorded declines were, by comparison, less pronounced. European and Asian countries' exports followed a similar pattern, both decreasing by around 11 per cent. In particular, the EU(27) exports fell by 11 per cent, China's by 8 per cent while in Japan the decline was by 10 per cent.

100. Available short-term data of leading exporters suggest that recovery started in some economies but lags behind in others. In the first half of 2010, China's construction exports grew by 69 per cent compared to the same period of 2009. By contrast, EU (27) exports continued their downward trend, decreasing by 8 per cent year-on-year due to Germany's declining exports (-15 per cent). Germany is the largest exporter of construction in Europe. Financial turmoil in the United Arab Emirates, Japanese contractors' first partner country, resulted in a drop of Japan's exports by 32 per cent in the second half of 2009, and by 44 per cent in the first six months of 2010. Finally, the Russian Federation's exports were down by 20 per cent in the first half of the year.

Chart 25: Exports of construction in selected leading economies, first half 2009 – first half 2010
(Percentage change, year-on-year)

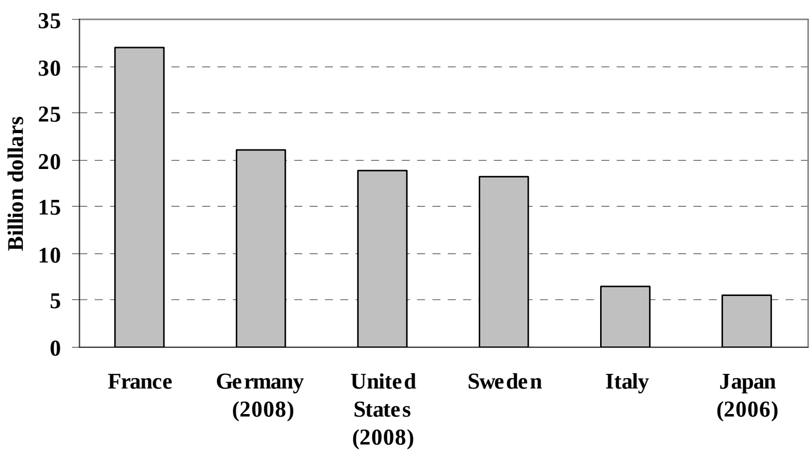


Source: IMF, Eurostat, and national data.

3. Outward FATS sales (Construction) in selected economies

101. According to available statistics, in 2008, the sales of German foreign affiliates in the construction sector reached US$21.1 billion. Over 80 per cent was generated by affiliates outside the EU (27), predominantly in the United States (40 per cent) and Australia (35 per cent). In 2007, French foreign affiliates generated a construction turnover of US$32 billion. Some 60 per cent came from foreign affiliates located in extra-EU(27) countries. Foreign affiliates in the United States accounted for 8 per cent of the total followed by Canada (5 percent), Switzerland, and Morocco (2 per cent each). **.**In 2008, sales of affiliates of U.S. firms engaged in construction as primary activity reached US$18.9 billion.

Chart 26: Outward sales of foreign affiliates engaged in construction of selected economies (outward FATS), 2007-2008
(Billion dollars)



Source: OECD, Eurostat and U.S. BEA.

C. INSURANCE SERVICES

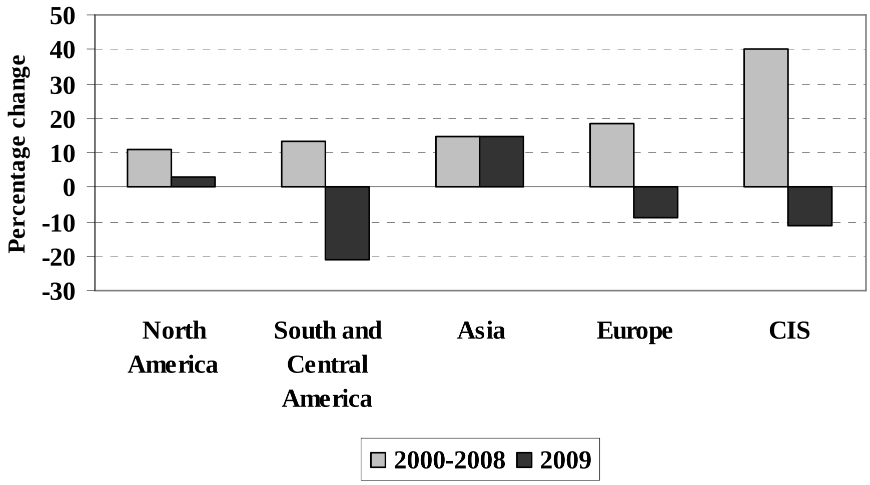
1. Exports Developments Between 2000 and 2008

102. Between 2000 and 2008, the global insurance sector expanded considerably. World insurance density, that is the average insurance spending per capita, increased by 6 per cent on average per year. In 2008, the highest insurance density levels were recorded in Europe, especially in Northern European countries, and in North America. However, growth was most rapid in the CIS and in Asia.[27]

103. The international supply of insurance services is very concentrated. In 2008, some 73 per cent of world exports originated from the EU (27) (53 per cent), the United States (13 per cent), and Switzerland (7 per cent). In the period 2000-2008, world exports of insurance services rose fast, averaging 16 per cent per year. The most rapid growth was recorded in the **CIS**. In the region, insurance services exports increased by 40 per cent on annual average due to expanding exports from the Russian Federation. During this period, insurance density in the country increased by 26 per cent per year.

104. Growth in **Europe** was also very dynamic with average annual increase by 19 per cent. Most extra-EU (27) exports of insurance services were destined to developed economies, with the United States accounting for more than the half, and Switzerland as the second partner (5 per cent). In Switzerland exports rose by 18 per cent. In **North America**, the United States exports rose by 15 per cent. In 2008, the EU (27) accounted around 25 per cent of the U.S. insurance services exports. Exports to Canada, the second largest partner, accounted for 22 per cent of the total.

Chart 27: Growth of insurance services exports in selected regions, 2000-2008 and 2009
(Percentage change)



Source WTO estimates.

105. **Asian economies** exports of insurance services grew by 15 per cent. In Singapore, the leading exporter in region, exports grew by 17 per cent. By comparison, growth was more pronounced in

[27] Insurance density is calculated dividing gross insurance premiums by the population. Source: Swiss Re.

China, where exports increased by 38 per cent on annual average. Insurance density in China rose by 27 per cent on average since 2000, recording the most rapid growth in the region.[28]

106. According to available data, in Asia, exports of insurance services were very regional. In 2008, 75 per cent of Singapore's exports were destined to Asian economies, with ASEAN members accounting for almost one third of the total. Australia, the Republic of Korea and Japan were the main individual partners. In the same year, Hong Kong, China's exports of insurance services to Asian countries reached 83 per cent. In the case of Japan, the share of Asian economies was somewhat lower (around 39 per cent). Exports to the EU (27), Japan's first partner, accounting for some 38 per cent of the total.

2. Recent rends (2009-2010)

107. The insurance sector showed resilience to the global financial crisis, although it suffered sharp declines in asset values. Nevertheless, the vast majority of insurance companies worldwide had enough risk capital to absorb the losses. The crisis affected insurance premiums which in 2008 contracted for the first time since 1980. In 2009, global premiums' real growth decreased by 1.1 per cent due to -1.8 per cent fall in premiums in developed economies. By contrast, insurance premiums in emerging economies continued to record positive growth (3.5 per cent).[29]

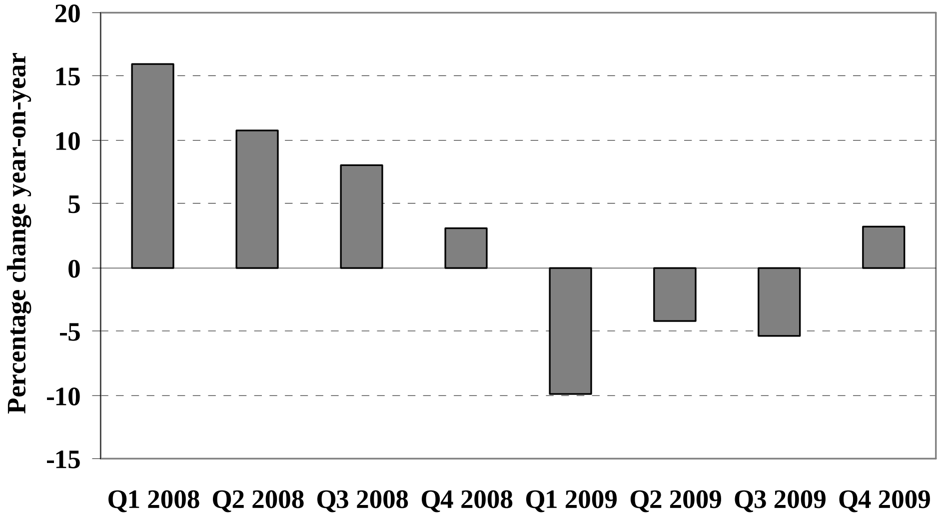
108. In 2009, world exports of insurance services declined by 6 per cent to US$80 billion. The crisis reached its peak in the first quarter of 2009 when world exports declined by 10 per cent. The sharpest drops were recorded in South and Central America where exports decreased by 21 per cent and in the CIS (-11 per cent). In European countries, exports declined by 9 per cent. However, in North America and Asia exports increased by 3 per cent and 2 per cent respectively.

109. Preliminary data show that in Europe, insurance exports increased by 15 per cent in the first quarter of 2010 compared to the same period of 2009. In North America, in the first half of the year, the United States' exports were down by 6 per cent year-on-year while Canada's were up by 16 per cent. In Asia, Singapore's exports rose by 46 per cent.

[28] Swiss Re.

[29] Swiss Re Sigma n.3/2009, n.2/2010 and "Global insurance review 2009 and outlook for 2010", December 2009.

Chart 28: World exports of insurance services, Q1 2008 - Q4 2009
(Percentage change, year-on-year)



Source: WTO estimates.

3. Outward FATS sales (Insurance and related activities) in selected economies

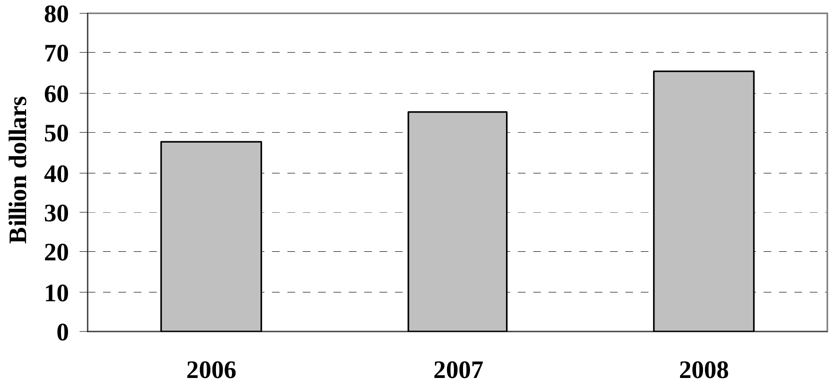
110. The measurement of the output of insurance services in FATS statistics can be problematic. In general, for most service sectors, total sales (or turnover) correspond to the output of the sector. In the case of insurance services, however, output will correspond to the total insurance premiums earned by the foreign affiliates while, in reality, only the service charge should be taken into account.[30] Thus, output is lower then sales.

111. The United States has estimated the service fee earned by foreign affiliates in the insurance sector. In 2008, US affiliates in insurance and related activities sold services for US$65.3 billion abroad, increasing by 17 per cent on average per year since 2006. In 2008, the increase was mainly due to strong growth in Asian economies, reflecting premium growth from expanded market penetration and favourable exchange rates.[31]

[30] Similar considerations apply to the sales by foreign affiliates engaged in the financial sector and in wholesale and retail distribution.

[31] U.S. BEA.

Chart 29: United States - Services supplied by foreign affiliates in insurance and related activities (outward FATS), 2006-2008
(Billion dollars)



Source: U.S. BEA.

D. FINANCIAL SERVICES

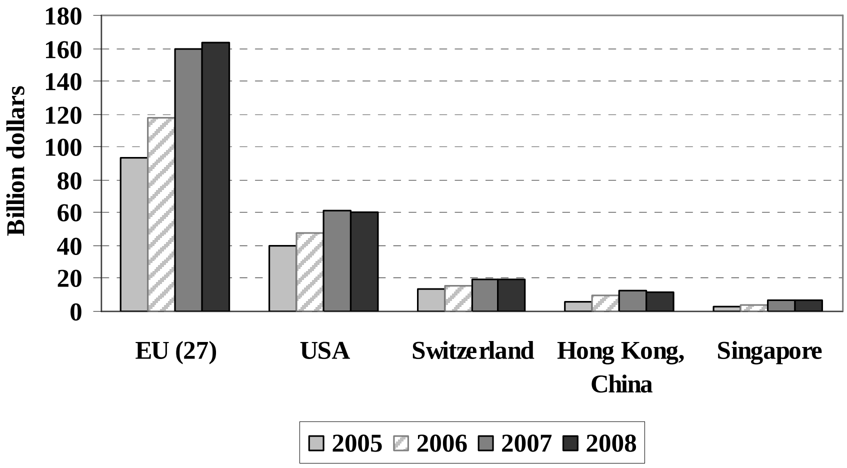
1. Exports Developments Between 2000 and 2008

112. In the period 2000-2008, world exports of financial services increased by 14 per cent on annual average driven by escalating exports from Europe and North America. Growth in all economies accelerated especially as from 2005, peaking to an unprecedented 32 per cent in 2007. In the same year, world exports of financial services accounted for almost 9 per cent of total world commercial services exports, up by two percentage points since 2000.

113. In **Europe**, between 2005 and 2007, the EU (27) exports of financial services expanded by 31 per cent per year, up to some US$160 billion. With some 30 per cent share, the United States was the most important extra-EU (27) partner, followed by Switzerland and Japan. Intra-EU (27) exports represented around 55 per cent of the total. In Switzerland, exports increased by 17 per cent.

114. In **North America**, United States' exports rose by 24 per cent in the period 2005-2007. Over 40 per cent of financial services exported by the United States related to financial asset management as well as financial advisory and custody services. Securities transactions (including brokerage services and underwriting as well as private placement services) accounted some 32-33 per cent of the total. The EU (27) was the United States' largest partner with a share of some 40 per cent, followed by Canada (6 per cent) and Japan (4 per cent).

Chart 30: Exports of financial services of selected economies 2005-2008
(Billion dollars)



Source: IMF, Eurostat and national data.

115. In **Asia**, financial services exports rose very fast, averaging 32 per cent between 2005 and 2007. In this period, the region's leading exporters recorded some the most rapid growth rates in the world. In Hong Kong, China's exports were up by 41 per cent and in Singapore by 47 per cent. The Republic of Korea recorded an increase by 56 per cent. Finally, in India, exports increased by 72 per cent, almost tripling its value in two years. According to available data, most international transactions in financial services by Asian economies involved the United States and the EU (27). For example, in the case of Japan, some 80 per cent of total exports were destined to the two economies. For Hong Kong, China the share was around 58 per cent, while for Singapore it totalled 40 per cent.[32]

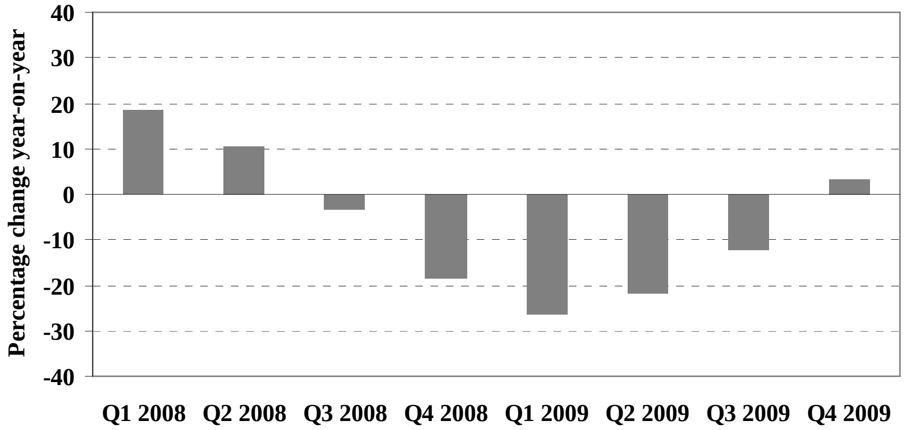
116. In the third quarter of 2008, with the onset of a global financial crisis, world exports of financial services dropped by 3 per cent, to plummet by 18 per cent in the last quarter of the year. In the Balance of Payments, exports of financial services comprise mainly fees and commissions earned by resident banks (and other financial institutions) arising from financial asset management activities and transactions in financial instruments with non residents. These commissions are primarily related to the value of the managed assets. Following the crisis in the financial markets, the value of assets under management fell sharply. This translated into a net reduction in the commissions and fees earned by resident banks, thus a collapse in exports of financial services.

2. Recent trends (2009-2010)

117. In 2009, following turmoil in the financial markets, world exports of financial services declined by 15 per cent to US$250 billion. Dropping by over 20 per cent year-on-year in the first half of the year, exports began to recover slowly in the last few months 2009. In the last quarter of 2009, world exports of financial services were up by 3 per cent year-on-year.

[32] For Hong Kong, China excluding financial intermediation services, which are not allocated geographically. For Singapore, excluding exports related to foreign exchange trading.

Chart 31: World exports of financial services, Q1 2008 - Q4 2009
(Percentage change, year-on-year)

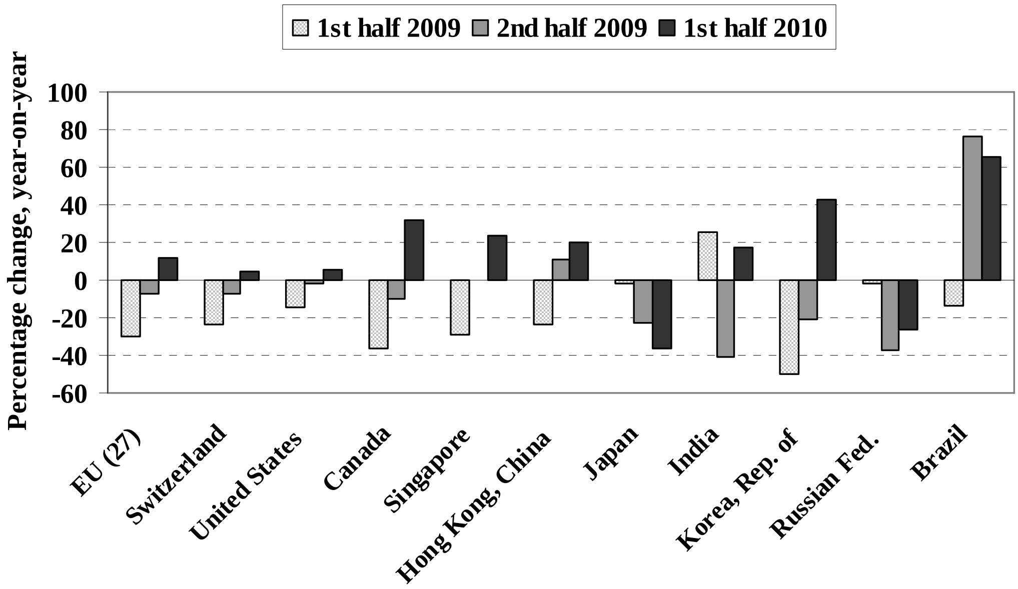


Source: WTO estimates.

118. Europe's financial sector was the most affected by the global crisis. In 2009, EU (27) exports of financial services plummeted by 19 per cent to US$133 billion, some US$30 billion less than in 2008. Switzerland's exports fell by 16 per cent mainly due to a decline in value of managed assets and a drop in transaction volume. In the United States, the second largest world exporter of financial services, exports declined by 13 per cent largely due to dropping receipts from financial management and advisory services. In Asia, Hong Kong, China, financial services exports declined by 7 per cent, while those from India contracted by 16 per cent.

119. At the start of 2010, exports of financial services began an upward trend in most economies. Although some leading exporters, such as Japan and the Russian Federation continued to record negative growth, data for the first half of 2010 point to a general recovery of the sector. Rebound was pronounced in several Asian economies such as the Republic of Korea and Singapore, but also in Brazil where, in the first half of 2010, exports rose by 65 per cent year-on-year. By comparison, financial services exports by the EU (27) and the United States rose at a slower path.

Chart 32: Exports of financial services of selected economies, first half 2009- second half 2010
(Percentage change, year-on-year)



Source: IMF, Eurostat and national data.

3. Outward FATS sales (Finance) in selected economies

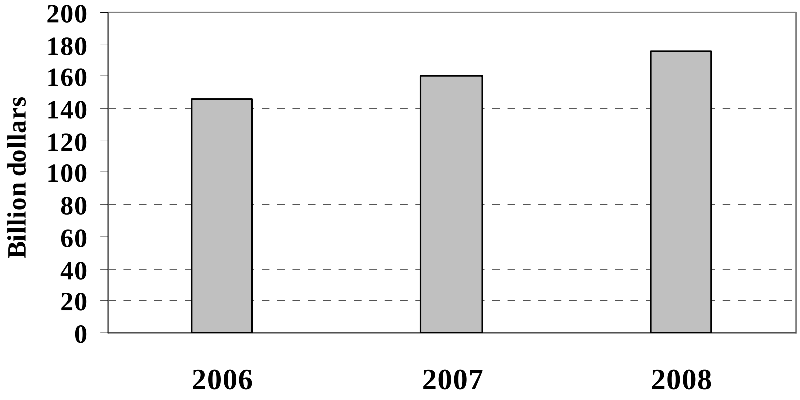
120. In FATS statistics, the value of the output of the financial sector cannot be gathered only from the sales made by foreign affiliates abroad. As a matter of fact, for financial intermediaries, total output is equal to services charges actually levied plus *financial intermediation services indirectly measured* (FISIM), which are commissions and fees that are not explicitly charged by the affiliates.[33] However, for many economies, measuring FISIM is a difficult task.

121. The United States has recently improved its FATS statistics to cover the activities of bank affiliates including an estimate of FISIM. In 2008, services supplied by U.S. foreign affiliates in financial intermediation totalled US$175.9 billion, up by 10 per cent compared to 2007. Despite turmoil in global financial markets, certain commissions and fees grew due to strong demand for services associated with equity trading, commodities trading, and securities lending. Newly established or acquired affiliates also contributed to the increase. Around 61 per cent of services were supplied by banks' affiliates located in European countries, mainly in the United Kingdom (over 41 per cent of total services supplied), and Switzerland (6 per cent). U.S. affiliates established in Canada, Japan and Australia, accounted for 6 per cent, 5 per cent, and 4 per cent respectively. By contrast, the services supplied to all Latin American countries (including Mexico and the Caribbean) were just over 10 per cent of the total.[34]

[33] FISIM is the implicit charge that banks and other financial institutions levy in the spread between interest rates receivable on financial assets and interest rates payable on financial liabilities. In accordance with the IMF BPM5, current international transactions in financial services recorded in the Balance of Payments do not include FISIM, with the exception of few economies. In the new BPM6, FISIM will be included in financial services.

[34] U.S. BEA "Survey of Current Business", October 2010.

Chart 33: United States - Services supplied by foreign affiliates in financial intermediation (outward FATS), 2006-2008
(Billion dollars)



Source: U.S. BEA.

122. Starting with the year 2005, Germany outward FATS statistics on financial intermediation comprise also the activities of foreign affiliates in monetary intermediation (banks and other financial institutions). In 2008, the output of foreign affiliates in financial intermediation stood at US$103.4 billion in 2008, declining by 20 per cent compared to 2007. This decline was mainly due to a 35 per cent drop in output of banks' affiliates in the United States following the financial crisis. In 2008, these affiliates accounted for 35 per cent of total output in financial intermediation, down from 42-43 per cent in 2006-2007. In 2008, 54 per cent of total output originated from banks' affiliates established outside the EU (27).

123. In Asia, India recently conducted a FATS survey on the operations of affiliates of Indian banks located abroad.[35] The survey contains separate data for branches and for subsidiaries. In India's financial year (FY) 2008-09,[36] total output of affiliates (branches and subsidiaries) of Indian banks to residents of the host country totalled US$422 million, up by 43 per cent in the previous year. Output originated mainly from credit related services and trade finance related services activities. The highest share of output was generated by affiliates established in the United Kingdom, Bahrain, Singapore, the United States, Hong Kong, China, Botswana, Canada and the United Arab Emirates.

E. COMPUTER AND INFORMATION SERVICES

1. Exports Developments Between 2000 and 2008

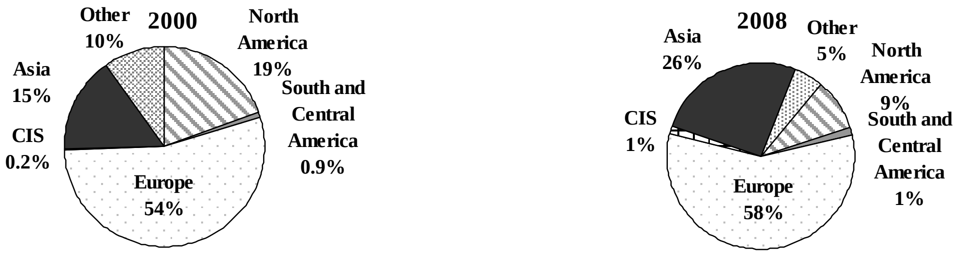
124. World exports of computer and information services increased by 19 per cent in the period 2000-2008, thus recording the most rapid period growth among all services sectors. Computer services are dominant in this sub-sector. Exports from Asia rose by 27 per cent while in the CIS recorded growth reached 50 per cent on annual average. Europe, which accounts for more than half of the world's exports, recorded 20 per cent increase. North American countries, by contrast, lagged behind (8 per cent), and, under the pressure of escalating exports from Asia, their participation in world exports gradually declined.

---

[35] Reserve Bank of India, "International Trade in Banking Services, 2008-2009", in "Monthly Bulletin, October 2010". The survey, carried out for the first time in 2008, contains also data on the activities of foreign banks' affiliates established in India.

[36] April 2008 to March 2009.

Chart 34: World exports of computer and information services by selected region, 2000 and 2008 (Percentage)



Source: WTO estimates.

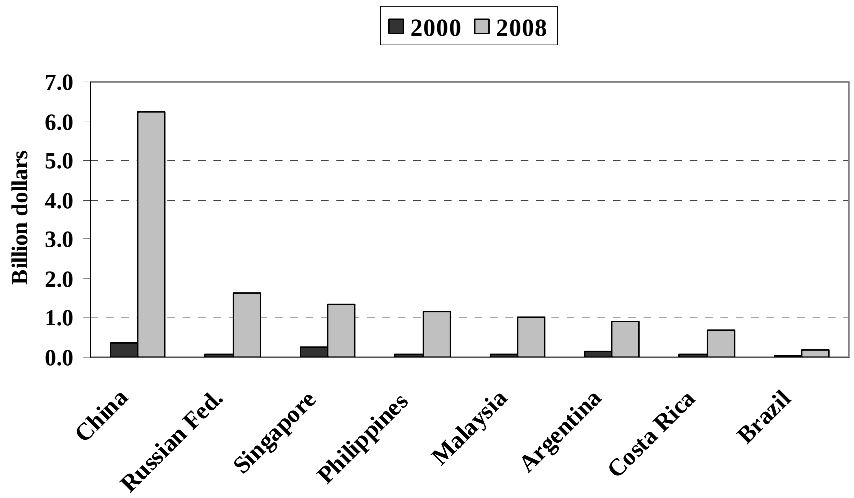
125. Between 2000 and 2008, Asian economies increased their share in world exports of computer and information services from 15 per cent in 2000 to 26 per cent in 2008. India became the second-major exporter of computer and information services in the world, a leading country in information technology (IT) services outsourcing. According to estimates, in 2008, India's exports with US$36 billion accounted for around 70 per cent of Asia's exports of computer and information services. The bulk of India's computer services exports was destined to the North American markets. In India's financial year (FY) 2008-2009, some 60 per cent of exports reached the United States, and 27 per cent European countries, mainly the United Kingdom (14 per cent).[37] The portion of exports destined to Asian peers was, by comparison, much lower (6.5 per cent) but on an upward trend, in particular, exports to East and West Asia. Around 68 per cent of total services were supplied cross-border, and 32 per cent through Mode 4. Supply through Mode 2 was negligible.[38]

126. Other economies in Asia also emerged as computer services suppliers such as Singapore, the Philippines and Malaysia. However, the most impressive growth was recorded in China, where the software industry expanded significantly. By the end of 2008, there were over 16000 software and related services providers in the country employing 8.5 million people. China's computer and information services exports increased by 43 per cent on annual average since 2000. In 2008, the United States was the first export destination, followed by ASEAN countries. Exports to these two markets accounted for over 53 per cent of China's total exports.

[37] "Survey on Computer Software and Information Technology Services Exports 2008-09", Reserve Bank of India, Monthly Bulletin August 2010. The breakdown of India's exports by country is based on data published on "software services" which cover computer services (IT services and software development), but also IT-enabled services (ITES) and Business Process Outsourcing (BPO). In FY 2008-09 (April 2008–March 2009), computer services exports accounted for 73 per cent of India's total "software services" exports.

[38] Breakdown of "software services" exports on the basis of resident-non resident trade in FY 2008-2009. The following section on outward FATS sales contains separate data on software services supplied by Indian foreign affiliates established abroad.

Chart 35 Exports of computer and information services in selected economies 2000-2008 (Billion dollars)



Source: IMF and national data.

127. Other countries in other regions also engaged in computer services export. Chosen as a base by several European companies, the Russian Federation saw its computer services exports rise annually by over 52 per cent on average since 2000. In South and Central America, Brazil and Costa Rica became important IT services outsourcing locations especially for North American firms. In the two economies exports of computer services increased respectively by 36 per cent and 27 per cent on annual average. In the Middle East, Israel remained a leading exporter of computer services. The country's exports rose by 6 per cent on average per year since 2000. Egypt, South Africa and Morocco were the major exporters in Africa but the value of their exports was very modest.

128. According to available data, in 2008, over 60 per cent of the EU (27) exports of computer and information services were destined to the intra-EU (27) market. The United States, Switzerland and the Russian Federation were the largest extra-EU (27) partners.

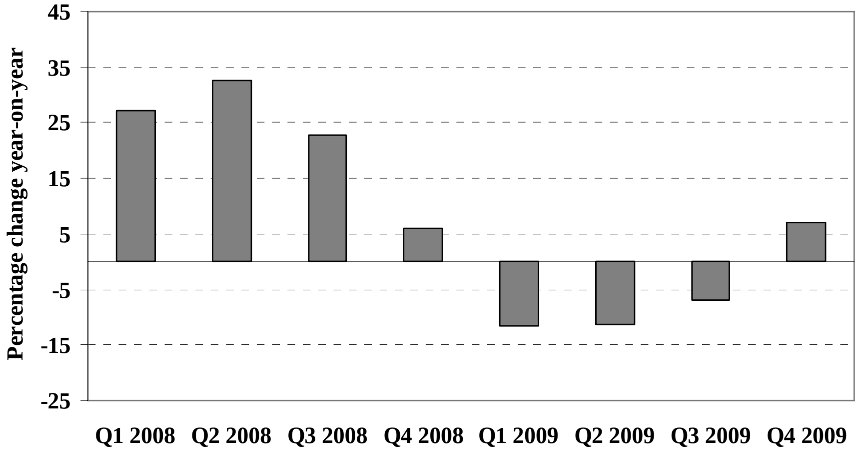
129. In North America, exports were very concentrated. In the case of the United States, exports to the first five partners in 2008 (EU(27), Canada, Japan, Switzerland and Australia) accounted for 79 per cent of the total, while some 68 per cent of Canada's exports reached the United States.

2. Recent trends (2009-2010)

130. Compared to other services sectors, the computer services industry coped relatively well with the economic downturn due to a regular demand for cost efficient technologies, the development of innovative software in sectors such as in manufacturing, finance, insurance, healthcare, as well as the need to address rising IT security concerns.

131. World exports of computer and information services were more resilient to the crisis and are estimated to have decreased by 6 per cent in 2009 only, after record growth of 23 per cent in 2008. The decline was due mainly to the EU (27) exports' fall by 9 per cent, as in the North America exports stagnated. In 2009, Asian exports of computer and information services decreased only slightly, by 2 per cent. According to Secretariat's estimates, India's exports declined by 5 per cent. Other emerging exporters in the region such as China and Singapore saw modest growth. In the case of the Philippines and Malaysia, exports of computer services grew respectively by 11 per cent and 41 per cent despite the crisis.

**Chart 36: World exports of computer and information services, Q1 2008 - Q4 2009
(Percentage change, year-on-year)**

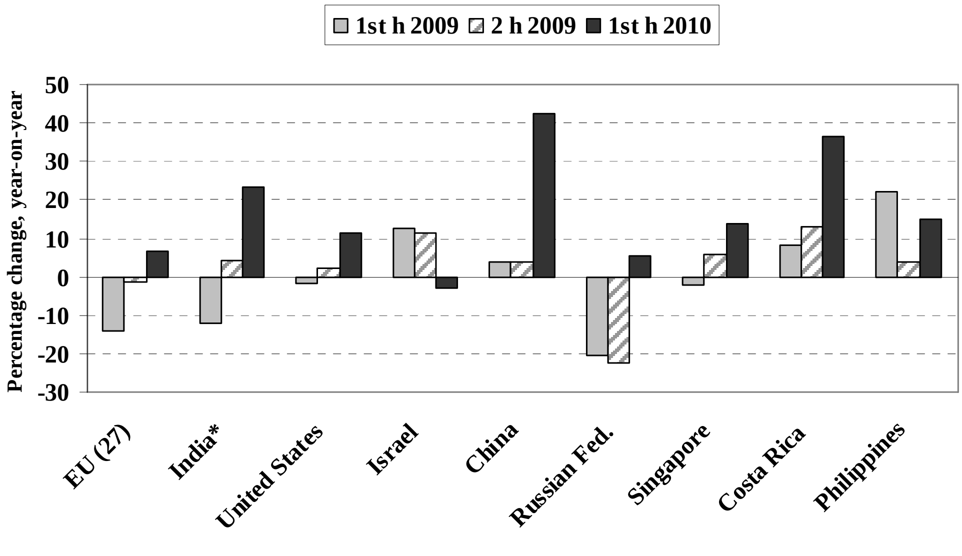


Source : WTO estimates.

132. In South and Central America, computer and information services exports increased by 10 per cent, as the major exporters in the region, Argentina, Costa Rica and Brazil, continued to record double-digits growth. Similarly, in the Middle East, Israel's exports grew by 12 per cent. The CIS countries faced the sharpest fall, with the Russian Federation's exports dropping by 21 per cent in 2009.

133. Preliminary data for the first half of 2010 show that exports recovered in all leading exporters, with the exception of Israel (-3 per cent). In the EU (27) and the United States the increase was by 7 per cent and 11 per cent year-on-year respectively. Growth, however, accelerated in emerging computer and information services exporters. For example, China's exports rose by 43 per cent followed by Costa Rica (37 per cent). Finally, in the Russian Federation, exports recovered after the 2009 drop.

**Chart 37: Growth of computer and information services exports in selected leading exporters, first half 2009 – second half 2010
(Percentage change, year-on-year)**



Software services.
Source: IMF and national data.

3. Outward FATS sales (computer activities; information sector) in selected economies

134. In 2006, services rendered by foreign affiliates of U.S. firms engaged in computer systems design and related services totalled US$52.5 billion. Half of this amount was supplied by foreign affiliates located in Europe. In particular, foreign affiliates in the United Kingdom accounted for 17 per cent of total services supplied. Affiliates located in Canada accounted for 8 per cent and those in Latin America (including Mexico and the Caribbean) for 6 per cent.

135. Services supplied by foreign affiliates engaged in activities such as Internet service providers, web search portals, data processing services, internet publishing and broadcasting, and other information services reached US$29.5 billion. Foreign affiliates in the information sector (newspapers, periodicals books, and software publishers) delivered services for US$25.4 billion.

136. India recently carried out a survey on the operations of its foreign affiliates in "software services" abroad.[39] In India's financial year (FY) 2008-09, total sales made by Indian foreign affiliates to residents of the host country totalled US$7.3 billion. Over 70 per cent of turnover was generated by affiliates established in the United States, which were also the most numerous (around 31 per cent of the total). Sales made to U.S residents by Indian affiliates located in the United States and engaged in "software services" stood at US$5.1 in FY 2008-2009. Affiliates established in the United Kingdom ranked second, with total turnover at US$723 million, while those located in Germany totalled US$310 million. Other countries in which India had a commercial presence in "software services" activities were, ranked by the size of local sales, Australia, Singapore, the Netherlands and Canada. Overall they totalled US$551 million. According to national data, in FY 2008-2009, India supplied 56 per cent of "software services" through Mode 1, 0.1 per cent through Mode 2, 16.8 per cent through Mode 3 and 26.8 per cent through Mode 4.

137. In the EU (27), Germany's sales by affiliates in computer activities rose by 18 per cent per year between 2002 and 2008 reaching US$30.26 billion in 2008, while sales by French foreign affiliates totalled US$21.6 billion in 2007. Recently also Israel started to compile FATS statistics. According to available data, in 2005, sales by Israeli foreign affiliates engaged in computer and related services abroad reached US$1.5 billion.

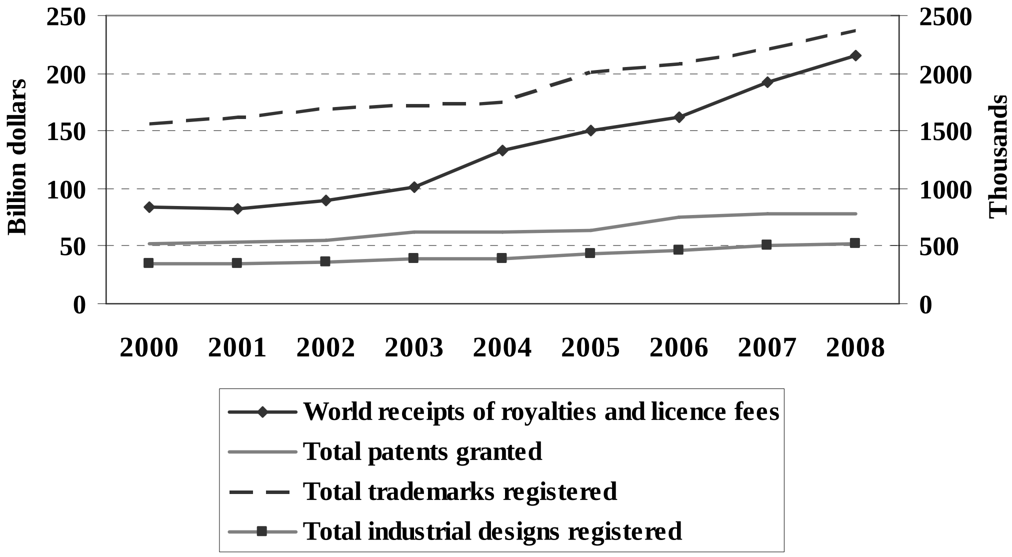
F. ROYALTIES AND LICENCE FEES

1. Exports Developments Between 2000 and 2008

138. Between 2000 and 2008 world receipts of royalties and licence fees rose by 12 per cent per year, reflecting the increase in the total number of patents grants, as well as trademarks and industrial designs registrations over the period. World receipts of royalties and licence fees are concentrated in developed economies. In 2008, North America and Europe accounted for over 83 per cent of total world receipts. However, North American countries saw their share gradually decline from some 54 per cent in 2000 to 44 per cent in 2008 due to higher receipts originated from Europe.

[39] "Survey on Computer Software and Information Technology Services Exports 2008-09", Reserve Bank of India, Monthly Bulletin August 2010.

Chart 38: World receipts of royalties and licence fees, total patents granted, trademarks, and industrial designs registered
(Billion dollars and thousands)



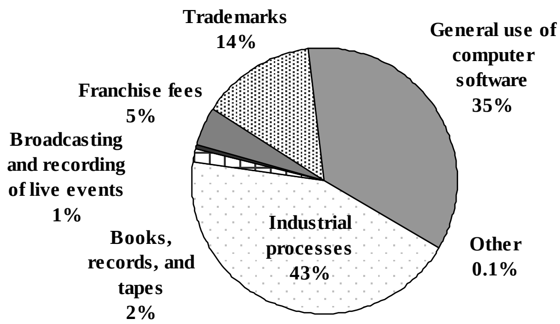
Source: WTO estimates and WIPO.

139. In Europe, receipts of royalties and licence fees rose on average by 16 per cent driven upwards by Switzerland, and, within the EU (27), by Germany, and France. In these economies receipts grew by over 20 per cent over the period. In the United Kingdom, however, which is the largest individual recipient of royalties and licence fees in Europe, growth was, by comparison, slower averaging 7 per cent. In 2008, over 76 per cent of U.K. receipts originated from "other royalties and licence fees" which includes receipts from the use of patents, copyrights, industrial processes and designs, as well as the licensed use of originals and prototypes.

140. In the United States, the leading recipient of royalties and licence fees in the world, receipts grew by 10 per cent over the period, less than the world's average. In 2008, 43 per cent of U.S. receipts were derived from industrial processes and 35 per cent from general use of computer software. Receipts from the use of trademarks and from franchise fees accounted for 14 per cent and 5 per cent respectively. Around half of the U.S. transactions took place with the EU (27), and some 9 per cent with Switzerland. Japan followed with 8 per cent. The majority of U.S. royalties and licence fees receipts originates from transactions between affiliates.

141. In Asia, the largest recipient is Japan. In 2008, some 12 per cent of world receipts of royalties and licence fees came from Japan. The country's transactions are concentrated, with the first three partners, the United States, the EU (27), and China, accounting for almost two thirds of the total.

Chart 39: United States Receipts of Royalties and Licence Fees by Type, 2008
(Percentage)

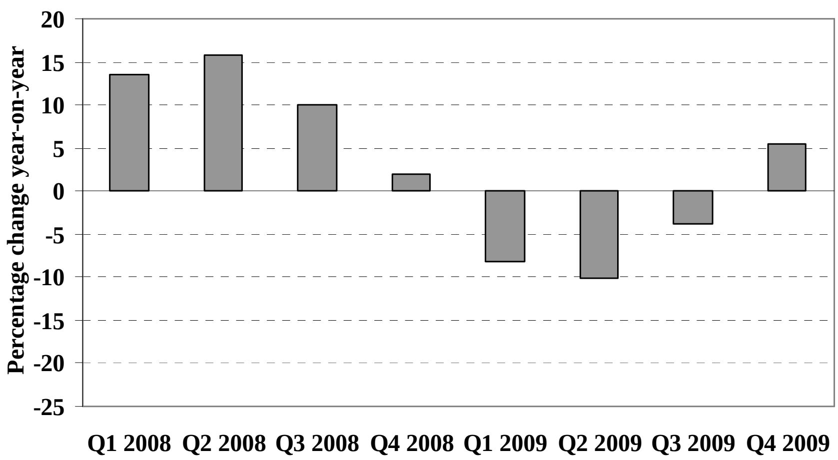


Source: U.S. BEA.

2. Recent trends (2009-2010)

142. Among service categories, world receipts of royalties and licence fees recorded the best performance during the crisis, declining only by 3 per cent to US$215 billion in 2009. The decrease was due largely to falling receipts in the United States (-8 per cent). By contrast, in the EU(27) and in Switzerland, receipts increased respectively by 7 per cent and almost 30 per cent despite the economic downturn. Japan's receipts also recorded a sharp drop (-16 per cent) due to falling transactions with its main partners.

Chart 40: World receipts of royalties and licence fees, Q1 2008 –Q4 2009
(Percentage change, year-on-year)



Source: WTO estimates.

143. In the United States, receipts of royalties and license fees decreased for the first time since 2001. Fees that U.S. firms received from their foreign affiliates relating to the use of industrial processes and products (including patents) dropped sharply, reflecting the decline in manufacturing

activity due to the global recession. Receipts received from the German affiliates of U.S. firms for the use of industrial processes declined because of a drop, in particular, in automotive production.[40]

144. In the first eight months of 2010, rebound in global manufacturing activity resulted in U.S. receipts of royalties and licence fees grow by 13 per cent year-on-year, and Japan's by over 28 per cent. In the in the first half of the year, EU (27), receipts continued their upward trend, increasing by 4 per cent year-on-year.

G. OTHER BUSINESS SERVICES

1. Exports Developments Between 2000 and 2008

145. Other business services are some of the most dynamic services exported, accounting for a quarter of world exports of total commercial services. Growing on average by 15 per cent per year between 2000 and 2008, world exports of other business services reached US$940 billion in 2008. Half of other business services exported in the world originated from Europe, 26 per cent from Asia and some 12 per cent from North America.

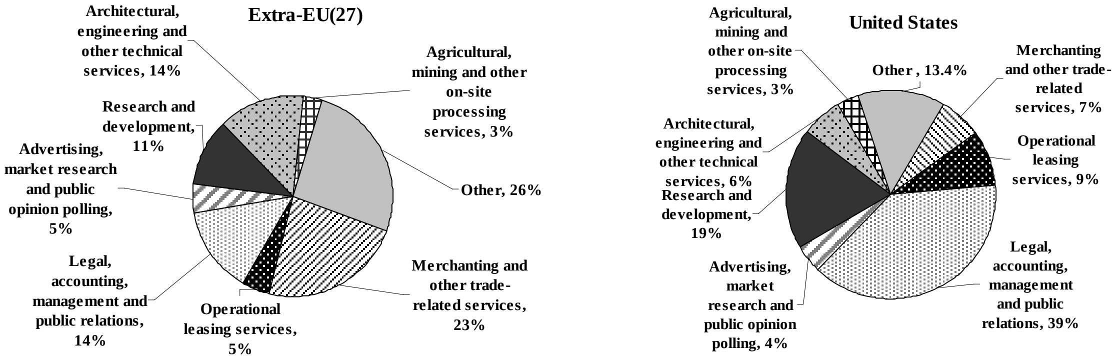
146. The nature of the services actually traded under the aggregate “other business services” varies significantly among economies. In **Europe**, the category *miscellaneous business, professional and technical services* was the largest contributor. In 2008, it accounted for 72 per cent of extra-EU (27) exports of other business services. In particular, the most exported services were *architectural, engineering and other technical services* as well as *legal, accounting, management and public relations services*, accounting each for 14 per cent of the total. *Research and Development (R&D) services* represented 11 per cent of total. The United States and Switzerland were the main destinations of extra-EU (27) exports of other business services, with an overall share of 42 per cent. In Norway, the part of *miscellaneous business, professional and technical services* was higher (83 per cent) with *agricultural, mining and other on-site processing services* accounting for almost one third of the total. Between 2000 and 2008, Europe's exports of other business services increased by 16 per cent on annual average.

147. In **North America**, the United States showed a similar pattern. Business, professional and technical services accounted for 85 per cent of other business services. *Legal, accounting, management, consulting and public relations services* was the main category (39 per cent). In 2008, half of *management, consulting and public relations services* and some 44 per cent of *legal services* and were exported to the EU (27), the latter mainly to the United Kingdom. R&D services accounted for 19 per cent of total U.S. exports of other business services. The largest R&D services destinations were again the EU (27) countries - in particular Ireland and the Netherlands, as well as Japan and Switzerland. The United States exports of other business services grew by 11 per cent in the period 2000-2008.

148. In the region, Canada presented a similar export structure with over 90 per cent of exports of other business services made up by *business, professional and technical services*. mainly *legal, accounting, management and public relations services, architectural, engineering and other technical consultancy services* as well as *R&D services*.

[40] U.S. BEA "Survey of Current Business", October 2010.

Chart 41: Structure of other business services in selected economies, 2008
(Percentage)



Source: Eurostat and US BEA.

149. Moving to the **Far-East Asian economies**, *merchanting and other trade-related services* were the biggest items. In 2008, in Japan, China, as well as Singapore the share of these services accounted for 59 per cent, 56 per cent and 61 per cent respectively of the total other business services exported. In the case of Hong Kong, China, the share reached 84 per cent. However, in China, exports of business, professional and technical services, rose by 56 per cent on annual average since 2000, reflecting the economy's growing participation in the Business Process Outsourcing (BPO) industry. In 2008, China's main export markets were Hong Kong, China, the United States and the EU (27).

150. In **South Asian countries**, such as India, the Philippines, and Malaysia, *business, professional and technical services* represented more than 90 per cent of exports of other business services. India has rapidly become the leading BPO destination, providing remote services such as interactive customer services (call centres), medical and legal transcription services, finance and accounting, auditing, bookkeeping and tax consulting services, as well as business and corporate research. The Philippines and Malaysia recently emerged as alternative BPO locations. Since 2000, the Philippines' exports of other business services increased by 40 per cent on annual average. With 70 per cent share, call centres represent the largest segment of the Philippines' BPO industry.[41] Between 2000 and 2008, Asia's exports of other business services grew by 15 per cent on average per year.

151. In the **Middle East**, over recent years, Israel has become an important world exporter of *R&D services*. Many international firms have set up R&D centres in Israel to benefit from the country’s advanced infrastructure and highly-skilled manpower. In 2008, R&D services represented some 56 per cent of the country's exports of other business services.

152. In **South and Central America**, exports of other business services increased by 17 per cent on annual average since 2000 due to Brazil's performance. The country's exports were driven by increasing exports of *business, professional and technical services*. In 2008, *architectural, engineering and other technical services* made up for 39 per cent of other business exports.

153. In the **CIS**, the Russian Federation's exports were very dynamic rising by 29 per cent on annual average. The country's exports of other business services related mainly to *business, professional and technical services*. In particular, *legal, accounting, management and public relations services* as well as *advertising, market research and public opinion polling* were the most important

[41] Business Processing Association Philippines (BPA/P) at http://www.bpap.org.

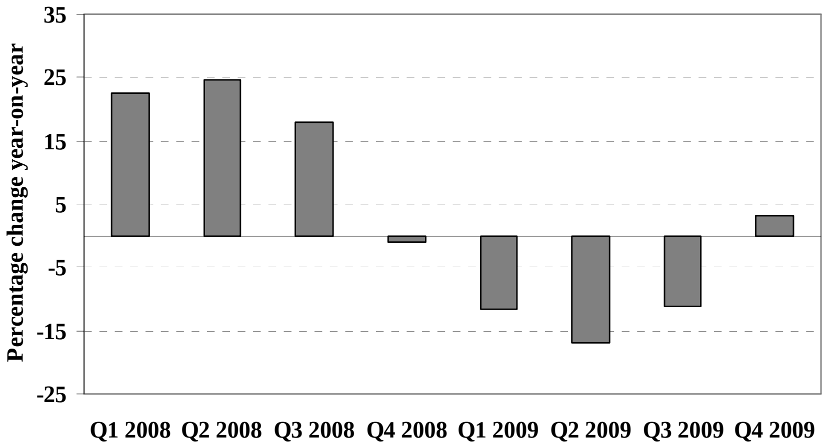
sub-sectors. More than half of the Russian Federation's exports of other business services reached the EU (27).

154. Finally, in **Africa**, the largest exporters of other business services were Morocco and Egypt, essentially exporting *business, professional and technical services*. In particular, over recent years Morocco has emerged as BPO provider for French-speaking countries, specializing in call centres activities.

2. Recent trends (2009-2010)

155. In 2009, world exports of other business services dropped to US$855 billion, declining by 9 per cent as a result of the global economic crisis. In 2009, European and CIS countries were the most affected recording each a drop by 13 per cent, followed by Asian economies (-7 per cent). By contrast, in both North America and South and Central America the decline was less pronounced, by 2 per cent.

Chart 42: World exports of other business services, Q1 2008 – Q4 2009
(Percentage change, year-on-year)



Source: WTO estimates.

156. In 2009, the EU (27) exports of other business services declined by around 13 per cent mainly due to falling exports of *business, professional and technical services* in many leading exporters. In the United Kingdom and Italy exports of these services declined by over 20 per cent, in the Netherlands by 14 per cent, in Germany and France by 7 per cent and 9 per cent respectively. In general, all business, professional and technical services sub-sectors were affected. *Merchanting and trade related services* receipts also fell significantly, plummeting by 20-30 per cent in several EU(27) member countries. Finally, double-digits drops were recorded also in exports of *operational leasing services*.

157. In North America, exports decreased only by 2 per cent thanks to the resilience of the United States' overall exports of business services which still showed a slight growth of 1 per cent. Within this category, however, the individual sub-sectors performed differently. *Management and consulting services* declined by 3 per cent, mostly related to a 36 percent drop in receipts from Switzerland. *Architectural, engineering, and other technical services* as well as *advertising services* fell by 4 per cent. *Legal services* exports decreased slightly (-1 per cent). *Merchanting and trade-related services*

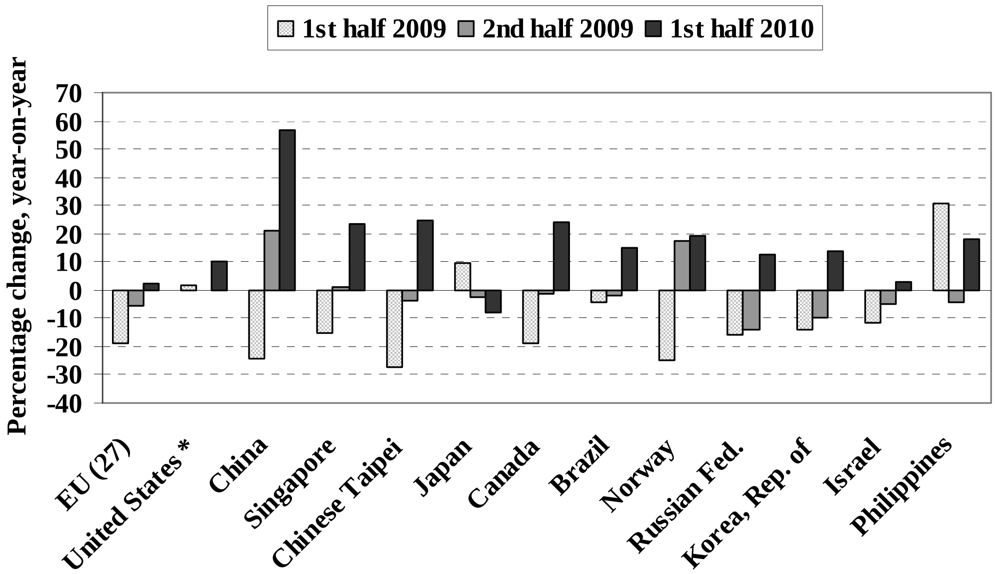
receipts, dropped by 31 percent. *Operational leasing services* exports stagnated. Some sectors, however, continued to record positive growth despite the adverse economic context. In particular, *R&D services* grew by 5 per cent and *industrial engineering services* by 31 per cent.

158. In 2009, Asia's other business services receipts were affected by the financial crisis, falling by 7 per cent on average. Exports decreased by 2 per cent in China and by 7 per cent in Singapore. Chinese Taipei's exports dropped by 16 per cent. In Hong Kong, China, receipts of *merchanting and trade-related services* decreased by 6 per cent. Despite the crisis, some countries within the region recorded positive growth. For example, Japan's exports rose by 3 per cent thanks to continued growth in all sub-sectors. In the Philippines, exports expanded by 14 per cent due to sustained growth of the BPO sector.

159. By the first half of 2010, world exports of other business services recovered in all countries although at different paths. In North America, the United States' exports increased by 10 per cent while in Canada, the average growth was above 20 per cent due, in particular, to fast rising exports of *management services*, and *R&D services* (30 per cent for both categories). In Europe, EU (27) exports lagged behind, rising only by 2 per cent year-on-year, due to slow recovery of exports of business, professional and technical services in leading traders. However, within the region, Norway's exports grew by 19 per cent year-on-year.

160. Asian economies recorded some of the most rapid growth. In China and Singapore, exports rose by 53 per cent and 24 per cent respectively compared to the first half of 2009. In Hong Kong, China, revenues from *merchanting and trade-related services* increased by 23 per cent year-on-year. By contrast, in Japan, the same category recorded sharp declines and translated into an overall export contraction by 8 per cent.

Chart 43: Exports of other business services in selected economies, first half 2009 – first half 2010
(Percentage change, year-on-year)

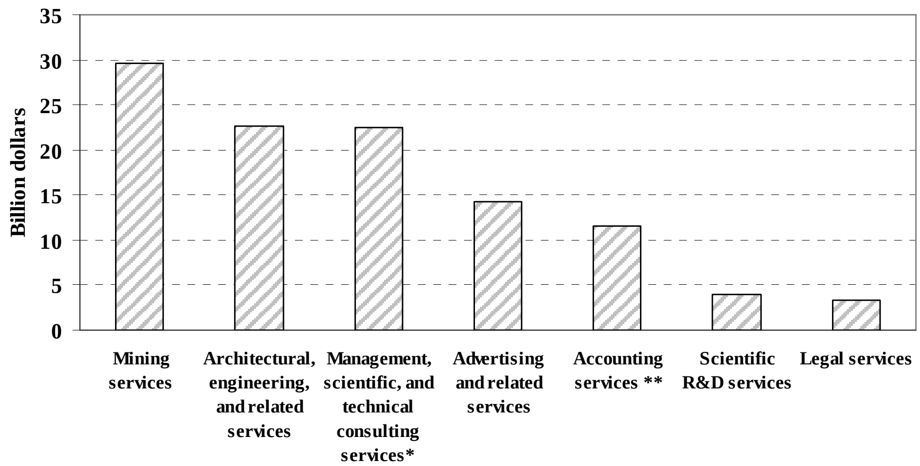


** WTO Secretariat estimates.*
Source: IMF, Eurostat, and national data.

3. Outward FATS (Business, professional and technical services/Other business services) in selected economies

161. The supply of services of US foreign affiliates engaged in business, professional and technical services abroad grew considerably between 2006 and 2008. For example, services supplied by affiliates in *architectural, engineering, and related services* activities rose by 19 per cent on average per year reaching US$22.6 billion in 2008. This increase was due to strong growth in geographically widespread projects in infrastructure, power, and oil and gas. Similarly, in *mining*, services supplied expanded by 32 per cent annually to US$29.6 billion in 2008, boosted by robust demand for drilling services and higher rig rates. U.S foreign affiliates in *advertising and related services* and in *accounting and related services* activities, predominantly located in Europe, rendered services respectively for US$14.2 billion and US$11.5 billion in 2008.[42] The bulk of *management*, *scientific and technical consulting services*, as well as *legal services* and *scientific R&D services* was also supplied by foreign affiliates established in European countries (82 per cent in the case of *legal services* and 88 per cent for *scientific R&D services* in 2008).

Chart 44: United States - Services supplied by foreign affiliates engaged in selected professional, scientific and technical services (outward FATS), 2008
(Billion dollars)

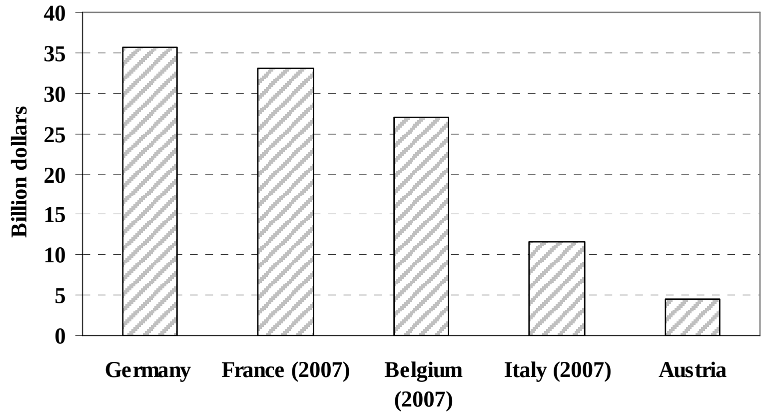


* Includes also management of companies and enterprises.
** Includes tax preparation, bookkeeping, and payroll services.
Source: U.S. BEA.

162. To the Secretariat's knowledge, some 15 European countries report data on the turnover of foreign affiliates engaged abroad in *other business activities* and in *R&D services*. However, little information is available on specific sub-sectors, such as legal services, or accounting services. In 2008, the sales of German foreign affiliates engaged in these activities reached US$35.7 billion, while those of French foreign affiliates stood at US$33.1 billion in 2007.

[42] U.S. BEA "Survey of Current Business", October 2010.

Chart 45: Outward sales of foreign affiliates engaged abroad in other business services and in R&D services activities (outward FATS) of selected European economies, 2007-2008
(Billion dollars)



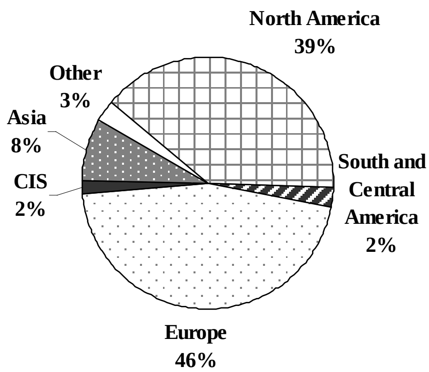
Source: Eurostat.

H. PERSONAL, CULTURAL AND RECREATIONAL SERVICES

1. Exports Developments Between 2000 and 2008

163. Between 2000 and 2008, world exports of personal, cultural and recreational services increased by 7 per cent on average per year. Largely accounted for by audiovisual and related services, world exports of personal, cultural and recreational services are very concentrated.[43] In 2008, around 85 per cent of world exports originated from North America (39 per cent) and European countries (46 per cent). Compared to other sectors, personal, cultural, and recreational services are the smallest in value, representing 1 per cent of world total commercial services exports.

Chart 46: World exports of personal, cultural, and recreational services by selected region, 2008
(Percentage)



Source: WTO estimates.

[43] Almost no Balance of Payments data are available specifically on education services and on health services, the other sub-sectors of personal, cultural and recreational services.

164. In the period 2000-2008, **North America's** exports, mainly audiovisual and related services, grew by 6 per cent on annual average. The United States was the world largest motion picture producer in terms of revenue, with the top movie companies located in the country. In 2008, 19 out of the top 20 films by gross box office revenue worldwide, were US-produced or co-produced. The economy ranked first also as exporter of television programmes.[44] In 2008, 61 per cent of the United States' exports of audiovisual and related services were destined to the EU (27), followed by Canada (10 per cent) and Japan (5 per cent).

165. In **Europe**, exports rose by 8 per cent on average per year, with the EU (27) accounting for over 90 per cent of the region's exports of personal, cultural and recreational services. The United Kingdom, France, and Spain contributed for half of EU (27) exports. Audiovisual and related services were the dominant sector. Over 60 per cent of the EU (27) exports of audiovisual and related services were destined to the internal market and some 18 per cent to the United States.

166. Exports from **Asia** increased somewhat more rapidly (9 per cent). In 2008, India was the fifth leading exporter of personal, cultural, and recreational services. Over recent years, the country's exports increased significantly. In 2008, India was the major movie producer in the world in terms of number of motion pictures.

167. China's exports of personal, cultural and recreational services – all audiovisual and related services, also expanded considerably (57 on average per year since 2000) driven by rising exports of television and radio programmes, as well as of movies production. In 2008, China was the fourth world producer of motion pictures in terms of number.[45] The United States was China's largest export market in 2008, followed by Hong Kong, China. Overall, these two economies accounted for over 65 per cent of the China's total exports. Finally, exports from the Republic Korea increased by 18 per cent on annual average, with audiovisual and related services representing 39 per cent.

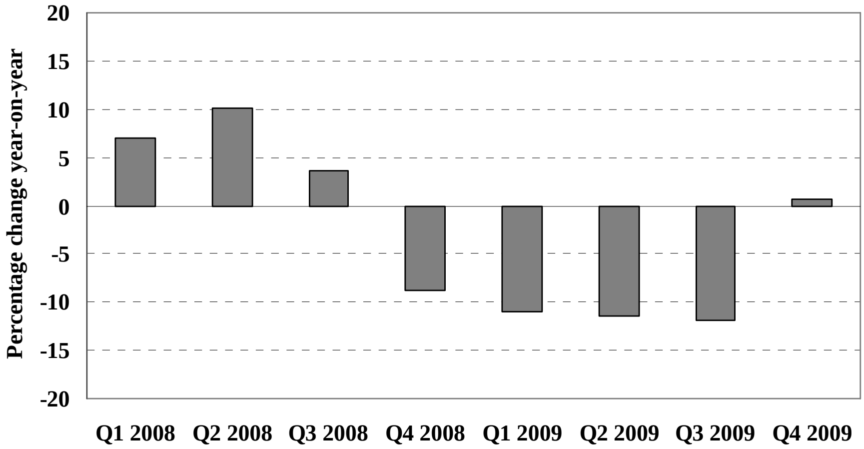
168. Exports from other regions were marginal; however, by comparison, they increased more rapidly. Between 2000 and 2008, in **South and Central America** exports grew by 21 per cent mainly due to Argentina's fast growth of audiovisual and related services (50 per cent on average per year). In 2008, the country accounted alone for 44 per cent of the region's exports of personal, cultural and recreational services. In the **CIS**, recorded average annual growth reached 43 per cent, due to expanding exports by the Russian Federation and Ukraine. In 2008, 47 per cent of the Russian Federation's exports of personal, cultural and recreational services reached the EU (27), followed by the United States (15 per cent).

2. Recent trends (2009-2010)

169. In 2009, world exports of personal, cultural and recreational services were severely affected by the global economic downturn, contracting by 11 per cent to US$40 billion. Europe and North America saw their exports decrease respectively by 10 per cent and 7 per cent. By comparison, the decline was more pronounced in emerging regions. In Asia, exports of personal, cultural and recreational services dropped by 25 per cent and in the CIS by 26 per cent. Exports from South and Central America recorded a 20 per cent fall.

[44] S/C/W/310 page 7.
[45] S/C/W/310.

Chart 47: World exports of personal, cultural and recreational services, Q1 2008 – Q 4 2009
(Percentage change, year-on-year)



Source: WTO estimates.

170. According to preliminary data, exports of personal, cultural and recreational services are recovering worldwide. After having decreased by 7 per cent in 2009, EU (27) exports expanded by 21 per cent year-on-year in the first half of 2010, thanks to the United Kingdom doubling exports. In the same period, the United States' exports of audiovisual and related services increased by 9 per cent.[46] In South and Central America, Argentina's exports of personal, cultural and recreational services, which had declined by 20 per cent in 2009, grew by 9 per cent. In Asia, the Republic of Korea's exports were up by 37 per cent. Finally, exports recovered also in the Russian Federation (32 per cent).

3. Outward FATS sales (Motion picture, radio, television & other entertainment activities; education; health and social work) in selected economies

171. In 2006, services supplied by U.S. foreign affiliates engaged in motion picture and sound recording industries located abroad totalled US$10.4 billion.[47] Over 75 per cent of these services were rendered by affiliates established in Europe, particularly in the Netherlands and in the United Kingdom. In 2008, United States' foreign affiliates in arts, entertainment, and recreation reached US$11.6 billion, rising by 73 per cent on average per year since 2006.

172. Very few, scattered statistics are available on the total sales of European countries' foreign affiliates in motion picture, radio, television & other entertainment activities. According to available information, in 2008, Germany's sales were at US$2.7 billion, accounting for 85 per cent of total sales of German foreign affiliates engaged in recreational, cultural and sporting activities. Italy's sales stood at US$1.5 billion in 2007.

173. With respect to education, the value of services supplied by U.S. foreign affiliates in educational services reached 2.5 billion in 2008. Some 40 per cent of this amount was generated by affiliates located in Europe.

---

[46] At the time of writing, no data were available on the United States' overall exports of personal, cultural and recreational services.

[47] Data for 2007 and 2008 are not disclosed.

174. By contrast, foreign affiliates' sales in education of available European economies were very modest, with US$146 million for French foreign affiliates and US$89 million for Germany's in 2007. Finally, in 2006, U.S. foreign affiliates, active in health care and social assistance and established predominantly in Europe, rendered services for US$1.6 billion. Total sales by Germany's foreign affiliates stood at US$8.8 billion in 2008.

STATISTICAL ANNEX

Table SA-1- Leading exporters and importers in world trade in commercial services, 2009
(Billion dollars and percentage)

Rank	Exporter	Value	Share	Annual percentage change	Rank	Importer	Value	Share	Annual percentage change
1	United States	474	14.1	-9	1	United States	331	10.5	-9
2	United Kingdom	233	7.0	-18	2	Germany	253	8.1	-13
3	Germany	227	6.8	-12	3	United Kingdom	161	5.1	-18
4	France	143	4.3	-14	4	China	158	5.0	0
5	China	129	3.8	-12	5	Japan	147	4.7	-10
6	Japan	126	3.8	-14	6	France	126	4.0	-10
7	Spain	122	3.6	-14	7	Italy	115	3.6	-10
8	Italy	101	3.0	-14	8	Ireland	103	3.3	-5
9	Ireland	97	2.9	-5	9	Spain	87	2.8	-17
10	Netherlands	91	2.7	-12	10	Netherlands	85	2.7	-8
11	Singapore	88	2.6	-10	11	Singapore	81	2.6	-6
12	India	87	2.6	-15	12	India	80	2.5	-9
13	Hong Kong, China	86	2.6	-6	13	Canada	78	2.5	-12
14	Belgium	79	2.4	-8	14	Korea, Republic of	75	2.4	-19
15	Switzerland	69	2.1	-10	15	Belgium	74	2.4	-11
16	Sweden	61	1.8	-15	16	Russian Federation	59	1.9	-19
17	Luxembourg	61	1.8	-14	17	Denmark	51	1.6	-18
18	Canada	58	1.7	-13	18	Sweden	46	1.5	-14
19	Korea, Republic of	57	1.7	-25	19	Kingdom of Saudi Arabia	46	1.4	-8
20	Denmark	55	1.6	-24	20	Hong Kong, China	44	1.4	-5
21	Austria	53	1.6	-14	21	Brazil	44	1.4	-1
22	Australia	41	1.2	-7	22	Australia	41	1.3	-13
23	Russian Federation	41	1.2	-18	23	Thailand	38	1.2	-18
24	Norway	38	1.1	-17	24	Norway	38	1.2	-14
25	Greece	38	1.1	-25	25	Austria	37	1.2	-13
26	Turkey	33	1.0	-5	26	United Arab Emirates	37	1.2	-14
27	Taipei, Chinese	31	0.9	-11	27	Luxembourg	36	1.1	-13
28	Thailand	30	0.9	-9	28	Switzerland	36	1.1	-2
29	Poland	29	0.9	-19	29	Taipei, Chinese	29	0.9	-15
30	Malaysia	28	0.8	-7	30	Indonesia	28	0.9	-1
31	Brazil	26	0.8	-9	31	Malaysia	27	0.9	-10
32	Finland	25	0.7	-21	32	Poland	24	0.8	-21
33	Portugal	23	0.7	-13	33	Finland	23	0.7	-25
34	Israel	22	0.6	-10	34	Mexico	21	0.7	-15
35	Egypt	21	0.6	-14	35	Greece	20	0.6	-20
36	Czech Republic	20	0.6	-7	36	Czech Republic	19	0.6	6
37	Macao, China	19	0.6	6	37	Israel	17	0.5	-14
38	Hungary	18	0.5	-10	38	Iran, Islamic Rep. of [a]	16	0.5	...
39	Lebanon	17	0.5	-4	39	Hungary	16	0.5	-14
40	Mexico	15	0.5	-17	40	Turkey	16	0.5	-6
	Total of above	**3010**	**89.8**	**-**		**Total of above**	**2760**	**87.8**	**-**
	World	**3350**	**100.0**	**-12**		**World**	**3145**	**100.0**	**-12**

[a] Secretariat estimate.
Source: IMF and WTO estimates based on national data.

Table SA-2 - Leading exporters and importers in world trade in commercial services (excluding intra-EU (27) trade), 2009
(Billion dollars and percentage)

Rank	Exporter	Value	Share	Annual percentage change	Rank	Importer	Value	Share	Annual percentage change
1	Extra-EU(27) exports	652	26.3	-14	1	Extra-EU(27) imports	543	23.0	-13
2	United States	474	19.2	-9	2	United States	331	14.0	-9
3	China	129	5.2	-12	3	China	158	6.7	0
4	Japan	126	5.1	-14	4	Japan	147	6.2	-10
5	Singapore	88	3.5	-10	5	Singapore	81	3.5	-6
6	India	87	3.5	-15	6	India	80	3.4	-9
7	Hong Kong, China	86	3.5	-6	7	Canada	78	3.3	-12
8	Switzerland	69	2.8	-10	8	Korea, Republic of	75	3.2	-19
9	Canada	58	2.3	-13	9	Russian Federation	59	2.5	-19
10	Korea, Republic of	57	2.3	-25	10	Kingdom of Saudi Arabia	46	1.9	-8
11	Australia	41	1.7	-7	11	Hong Kong, China	44	1.9	-5
12	Russian Federation	41	1.7	-18	12	Brazil	44	1.9	-1
13	Norway	38	1.5	-17	13	Australia	41	1.8	-13
14	Turkey	33	1.3	-5	14	Thailand	38	1.6	-18
15	Taipei, Chinese	31	1.2	-11	15	Norway	38	1.6	-14
16	Thailand	30	1.2	-9	16	United Arab Emirates	37	1.6	-14
17	Malaysia	28	1.1	-7	17	Switzerland	36	1.5	-2
18	Brazil	26	1.1	-9	18	Taipei, Chinese	29	1.2	-15
19	Israel	22	0.9	-10	19	Indonesia	28	1.2	-1
20	Egypt	21	0.9	-14	20	Malaysia	27	1.1	-10
21	Macao, China	19	0.7	6	21	Mexico	21	0.9	-15
22	Lebanon	17	0.7	-4	22	Israel	17	0.7	-14
23	Mexico	15	0.6	-17	23	Iran, Islamic Rep. of [a]	16	0.7	...
24	Ukraine	13	0.5	-23	24	Turkey	16	0.7	-6
25	Indonesia	13	0.5	-10	25	Nigeria [a]	15	0.6	...
26	Morocco	12	0.5	-6	26	South Africa	14	0.6	-13
27	Croatia	12	0.5	-22	27	Lebanon	14	0.6	6
28	South Africa	12	0.5	-6	28	Egypt	13	0.5	-22
29	Argentina	11	0.4	-9	29	Argentina	11	0.5	-11
30	Kuwait	10	0.4	1	30	Kuwait	11	0.5	-9
31	Philippines	10	0.4	4	31	Algeria	11	0.5	-1
32	United Arab Emirates	10	0.4	6	32	Angola	11	0.5	-46
33	Kingdom of Saudi Arabia	9	0.4	2	33	Ukraine	11	0.5	-32
34	Cuba	9	0.4	-5	34	Kazakhstan	10	0.4	-9
35	Chile	8	0.3	-21	35	Chile	9	0.4	-18
36	New Zealand	8	0.3	-17	36	Bolivarian Rep. of Venezuela	9	0.4	-8
37	Iran, Islamic Rep. of [a]	7	0.3	...	37	Philippines	8	0.4	0
38	Viet Nam	6	0.2	-19	38	Qatar [a]	8	0.3	...
39	Panama	5	0.2	-7	39	New Zealand	8	0.3	-19
40	Tunisia	5	0.2	-10	40	Colombia	7	0.3	-4
	Total of above	2345	94.9	-		Total of above	2200	93.3	-
	World (excl. intra-EU (27))	2475	100.0	-11		World (excl. intra-EU (27))	2355	100.0	-11

[a] Secretariat estimate.
Source: IMF and WTO estimates based on national data.

Table SA-3 - Leading exporters and importers of transportation services, 2009
(Billion dollars and percentage)

	Value	Share in world exports/imports		Annual percentage change			
	2009	2000	2009	2000-09	2007	2008	2009
Exporters							
European Union (27)	318.0	42.5	45.4	9	21	16	-23
Extra-EU(27) exports	153.2	...	21.9	...	18	18	-23
United States	71.8	14.5	10.2	4	13	17	-21
Japan	31.6	7.4	4.5	2	12	11	-32
Singapore	30.7	3.4	4.4	11	28	23	-14
Korea, Republic of	28.9	3.9	4.1	9	30	33	-35
Hong Kong, China	25.0	3.7	3.6	8	14	13	-13
China	23.6	1.1	3.4	23	49	23	-39
Norway	15.9	2.8	2.3	6	19	13	-27
Russian Federation	12.4	1.0	1.8	15	17	27	-18
India	10.8	0.6	1.5	21	19	25	-5
Canada	8.9	2.2	1.3	2	6	3	-22
Turkey	7.6	0.8	1.1	11	32	19	-3
Egypt	6.7	0.8	1.0	11	27	17	-18
Ukraine	6.3	0.8	0.9	9	14	25	-18
Thailand	5.8	0.9	0.8	7	18	14	-20
Above 15	605.0	86.4	86.2	-	-	-	-
Importers							
European Union (27)	279.5	35.5	33.5	7	17	13	-24
Extra-EU(27) imports	123.6	...	14.8	...	13	17	-25
United States	80.7	15.7	9.7	2	3	10	-23
China	46.6	2.5	5.6	18	26	16	-7
Japan	40.6	8.0	4.9	2	14	10	-25
India	34.7	2.1	4.2	17	24	36	-17
Singapore	26.4	3.0	3.2	9	17	10	-14
Korea, Republic of	23.4	2.6	2.8	9	26	26	-36
United Arab Emirates	23.0	1.1	2.8	20	42	33	-10
Canada	17.3	2.2	2.1	7	14	13	-18
Thailand	17.3	1.6	2.1	11	11	26	-25
Hong Kong, China	13.6	1.5	1.6	9	20	14	-14
Indonesia	12.0	1.0	1.4	13	16	46	-13
Kingdom of Saudi Arabia	11.5	0.5	1.4	20	63	71	-27
Australia	10.5	1.5	1.3	6	15	13	-29
Norway	9.9	1.2	1.2	8	33	10	-32
Above 15	645.0	80.0	77.5	-	-	-	-

Source: IMF and WTO estimates based on national data.

Table SA-4 - Structure of transportation services exports in selected economies, 2008
(Million dollars)

Exporter	Total	Sea	Air	Other					
				Total	Space	Rail	Road	Inland waterway	Pipe-line
European Union (27)	411206	187573	121810	101825	766	11804	72863	2396	6266
Extra-EU(27)exports	199264	115274	60088	23913	587	3215	14816	294	3084
United States	90567	6020	44181	40366	...	0	0	...	...
Japan	46794	36883	9888	24	...	...	...	...	...
Korea, Republic of	44768	37956	6812	...	...	...	...	...	...
China	38418	25452	8065	4901	...	...	...	...	...
Hong Kong, China	28886	15815	9803	3270	...	...	...	...	...
Norway	21630	16274	690	4667	...	59	349	...	2329
Russian Federation	15024	3696	6165	5164	168	2092	725	...	2179
Canada	11483	3271	5050	3162	...	5	14	...	...
India	11318	9518	806	993	...	...	...	...	...
Egypt	8160	776	1259	6126	...	...	...	...	...
Turkey	7793	845	5197	1751	...	...	1751	...	...
Ukraine	7626	1299	1229	5098	...	1637	447	195	2560
Thailand	7282	...	...	...	...	...	...	...	...
Taipei, Chinese	7132	3458	3674	0	...	...	...	...	...
Malaysia	6766	2681	4017	68	...	...	...	...	...
Chile	6503	4224	1955	324	...	...	...	...	...
Switzerland	6493	...	...	2260	...	...	...	...	...
Brazil	5411	4576	675	160	...	...	160	...	...
Israel	5168	4092	1021	55	...	...	...	...	...
Panama	3097	2233	864	...	...	...	...	...	...

Source: IMF and WTO estimates based on national data.

Table SA-5 - Development of International seaborne trade, selected years
(Millions of tons loaded)

Year	Oil	Main bulks [a]	Other dry cargo	Total (all cargoes)
1970	1 442	448	676	2 566
1980	1 871	796	1 037	3 704
1990	1 755	968	1 285	4 008
2000	2 163	1 288	2 533	5 984
2006	2 648	1 888	3 009	7 545
2007	2 705	2 013	3 164	7 882
2008 [b]	2 749	2 097	3 322	8 168

[a] Iron ore, grain, coal, bauxite/alumina and phosphate.
[b] Preliminary.
Source: Review of Maritime Transport, UNCTAD (2009). Estimated by the UNCTAD secretariat, on the basis of data supplied by reporting countries, ports and specialized sources. Data have been updated to the most recent available.

Table SA-6 - Distribution of dwt capacity of vessel types, by country group or registration, 2009

	Total fleet	Oil tankers	Bulk carriers	General cargo [c]	Container ships	Other types
World total	100.00	100.00	100.00	100.00	100.00	100.00
Developed countries	18.23	20.05	11.50	17.28	27.09	26.73
Countries with economies in transition	1.06	0.82	0.50	4.68	0.11	2.13
Developing countries	25.21	23.33	27.19	35.01	18.85	24.30
of which:						
Africa	0.59	0.46	0.30	1.76	0.13	2.03
Americas	1.91	2.05	1.40	4.29	0.29	3.85
Asia	22.29	20.47	25.01	28.27	18.40	17.52
Oceania	0.42	0.35	0.49	0.69	0.03	0.91
Other, unallocated	0.39	0.24	0.19	1.73	0.03	1.01
10 major open and international registries [b]	55.11	55.56	60.62	41.31	53.91	45.83

[a] Vessels of 100 GT and above.
[b] There exists no clear definition of "open and international registries". UNCTAD has grouped the 10 major open_and international registries to include the 10 largest fleets with more than 90 per cent foreign-controlled tonnage.
[c] Including passenger/cargo.
Source: Review of Maritime Transport, UNCTAD (2009). Compiled by the UNCTAD secretariat, on the basis of data supplied by Lloyd's Register - Fairplay.

Table SA-7 - World sea-borne trade in 2006-2008, by types of cargo and Country group

Country group	Year	Goods loaded				Goods unloaded			
		Total	Crude	Products	Dry cargo	Total	Crude	Products	Dry cargo
		Millions of tons							
World	2006	7545	1783	865	4897	7720	1833	895	4992
	2007	7882	1814	891	5177	8061	1995	906	5160
	2008	8168	1834	915	5419	8181	1891	910	5379
Developed economies	2006	2461	133	336	1991	4166	1283	536	2347
	2007	2624	134	363	2126	3991	1246	524	2220
	2008	2742	117	375	2250	4029	1181	511	2337
Transition economies	2006	410	123	41	246	71	6	3	62
	2007	418	124	40	254	77	7	3	66
	2008	480	133	34	313	88	6	4	77
Developing economies	2006	4674	1527	487	2660	3484	545	356	2583
	2007	4841	1555	488	2798	3994	742	379	2874
	2008	4946	1584	506	2856	4064	704	395	2965
Africa	2006	704	354	86	264	358	41	40	276
	2007	720	363	82	275	377	46	46	286
	2008	719	359	84	276	378	42	45	290

Country group	Year	Goods loaded				Goods unloaded			
		Total	Crude	Products	Dry cargo	Total	Crude	Products	Dry cargo
		Millions of tons							
America	2006	1031	251	94	685	376	50	60	267
	2007	1077	252	90	734	423	76	64	283
	2008	1136	259	100	777	433	79	65	288
Asia	2006	2933	918	307	1708	2737	454	250	2033
	2007	3037	936	316	1785	3181	620	262	2299
	2008	3084	962	322	1800	3240	583	277	2379
Oceania	2006	6.8	4.4	0.1	2.4	12.9	0.0	6.7	6.2
	2007	7.1	4.5	0.1	2.5	13.5	0.0	7.0	6.5
	2008	7.3	4.6	0.1	2.5	13.8	0.0	7.1	6.6
		Percentage share							
World	2006	100.0	23.6	11.5	64.9	100.0	23.8	11.6	64.7
	2007	100.0	23.0	11.3	65.7	100.0	24.8	11.2	64.0
	2008	100.0	22.5	11.2	66.3	100.0	23.1	11.1	65.8
Developed economies	2006	32.6	7.5	38.9	40.7	54.0	70.0	59.8	47.0
	2007	33.3	7.4	40.8	41.1	49.5	62.5	57.8	43.0
	2008	33.6	6.4	41.0	41.5	49.3	62.4	56.1	43.5
Transition economies	2006	5.4	6.9	4.8	5.0	0.9	0.3	0.4	1.2
	2007	5.3	6.9	4.5	4.9	1.0	0.4	0.4	1.3
	2008	5.9	7.3	3.7	5.8	1.1	0.3	0.5	1.4
Developing economies	2006	62.0	85.7	56.3	54.3	45.1	29.7	39.8	51.7
	2007	61.4	85.7	54.7	54.0	49.6	37.2	41.8	55.7
	2008	60.6	86.4	55.3	52.7	49.7	37.2	43.4	55.1
Africa	2006	9.3	19.8	9.9	5.4	4.6	2.2	4.5	5.5
	2007	9.1	19.8	9.2	5.3	4.7	2.3	5.0	5.5
	2008	8.8	19.6	9.2	5.1	4.6	2.2	5.0	5.4
America	2006	13.7	14.1	10.9	14.0	4.9	2.7	6.7	5.3
	2007	13.7	13.9	10.1	14.2	5.3	3.8	7.1	5.5
	2008	13.9	14.1	10.9	14.3	5.3	4.2	7.2	5.4
Asia	2006	38.9	51.5	35.5	34.9	35.5	24.8	27.9	40.7
	2007	38.5	51.6	35.4	34.5	39.5	31.1	28.9	44.6
	2008	37.8	52.4	35.2	33.2	39.6	30.8	30.4	44.2
Oceania	2006	0.1	0.2	0.0	0.1	0.2	0.0	0.8	0.1
	2007	0.1	0.3	0.0	0.1	0.2	0.0	0.8	0.1
	2008	0.1	0.3	0.0	0.1	0.2	0.0	0.8	0.1

Source: Review of Maritime Transport, UNCTAD (2009). Estimated by the UNCTAD secretariat, on the basis of data supplied by reporting countries, ports and specialized sources. Data have been updated to the most recent available.

Table SA-8 - The 35 countries and territories with the largest controlled fleets ('000 dwt), as of 1 January 2009[a]

Rank	Economy of domicile [b]	Number of vessels			Deadweight tonnage ('000)			Percentage shares	
		National flag [c]	Foreign flag	Total	National flag	Foreign flag	Total	Foreign flag as percentage of economy total	Economy total as percentage of world total
1	Japan	733	2987	3720	12200	161086	173285	92.96	15.68
2	Greece	720	2344	3064	52833	116593	169427	68.82	15.33
3	Germany	479	3043	3522	17428	87525	104954	83.39	9.50
4	China	1944	1555	3499	37205	55594	92799	59.91	8.40
5	Norway	783	1244	2027	11543	38673	50216	77.01	4.54
6	Republic of Korea	797	438	1235	20859	25764	46623	55.26	4.22
7	United States	867	915	1782	20607	19359	39966	48.44	3.62
8	Hong Kong, China	307	373	680	18297	15427	33724	45.75	3.05
9	Denmark	347	567	914	11959	19637	31596	62.15	2.86
10	United Kingdom	398	520	918	11175	19741	30917	63.85	2.80
11	Chinese Taipei	91	540	631	4068	25735	29804	86.35	2.70
12	Singapore	545	331	876	16483	11747	28230	41.61	2.55
13	Italy	582	238	820	12854	6897	19750	34.92	1.79
14	Russian Federation	1516	557	2073	5944	12344	18288	67.50	1.66
15	India	495	69	564	14390	2823	17213	16.40	1.56
16	Canada	212	201	413	2454	14716	17171	85.71	1.55
17	Turkey	533	630	1163	6804	8647	15451	55.97	1.40
18	Kingdom of Saudi Arabia	73	99	172	1235	13677	14911	91.72	1.35
19	Iran, Islamic Rep. of	83	128	211	1358	13203	14561	90.67	1.32
20	Belgium	93	147	240	6283	7164	13447	53.28	1.22
21	Malaysia	338	97	435	7717	3842	11559	33.24	1.05
22	United Arab Emirates	58	347	405	702	8331	9033	92.23	0.82
23	Netherlands	491	267	758	4218	4187	8405	49.81	0.76
24	Cyprus	126	234	360	3196	5163	8359	61.76	0.76
25	Sweden	143	224	367	1740	5698	7438	76.60	0.67
26	Indonesia	715	106	821	4957	2065	7022	29.41	0.64
27	France	180	188	368	2989	3577	6565	54.48	0.59
28	Kuwait	38	44	82	3846	2603	6449	40.36	0.58
29	Viet Nam	389	67	456	3629	1939	5568	34.82	0.50
30	Brazil	129	15	144	2445	2266	4711	48.11	0.43
31	Spain	187	204	391	1562	2886	4448	64.88	0.40
32	Thailand	300	44	344	3507	620	4127	15.03	0.37
33	Switzerland	35	114	149	1012	2817	3829	73.57	0.35
34	Croatia	78	39	117	2312	985	3297	29.88	0.30
35	Bermuda	0	65	65	0	3228	3228	100.0	0.29

[a] Vessels of 1,000 GT and above, excluding the United States Reserve Fleet and the United States and Canadian Great Lakes fleets (which have a combined tonnage of 6.4 million dwt).

[b] The country of ownership indicates where the true controlling interest (i.e. parent company) of the fleet is located. In several cases, determining this has required making certain judgements. Thus, for instance, Greece is shown as the country of ownership for vessels owned by a Greek national with representative offices in New York, London and Piraeus, although the owner may be domiciled in the United States.

[c] Includes vessels flying the national flag but registered in territorial dependencies or associated self-governing territories such as the Isle of Man (United Kingdom), and also second registries such as DIS.

Source: *Review of Maritime Transport*, UNCTAD (2009). Compiled by the UNCTAD secretariat, on the basis of data supplied by Lloyd's Register - Fairplay.

Table SA-9 - Passenger-kilometres performed on scheduled services, 2009
(Countries and groups of countries whose airlines performed more than 100 million total tonne-kilometres in 2009 [a])

Economy	Total operations		International operations	
	Rank	Million passenger-kilometres performed	Rank	Million passenger-kilometres performed
United States	1	1227573	1	372738
China	2	330243	13	50831
Hong Kong, China		88071		88071
Macao, China		2078		2078
Germany	4	205371	3	196382
United Kingdom	3	230596	2	222278
United Arab Emirates	6	143849	4	143849
France	5	152256	5	133457
Japan	7	127859	10	66575
Republic of Korea	15	82264	9	77276
Netherlands	10	90184	6	90178
Singapore	13	84514	8	84514
Canada	8	107371	11	60979
Australia	9	100515	14	50061
Russian Federation	14	83828	19	37143
India	12	85768	16	43773
Spain	16	80134	12	59821
Ireland	11	87475	7	87475
Brazil	17	74049	25	20649
Thailand	18	53478	15	48885
Malaysia	20	45532	20	35020
Turkey	19	49529	17	40682
Memorandum				
World		4244540		2596410

[a] Most 2009 data are estimates, thus the ranking and the rate of increase or decrease may change when final data become available.
Source: ICAO Annual Report of the Council (2009).

Table SA-10 - Freight tonne-kilometres performed on scheduled services, 2009
(Countries and groups of countries whose airlines performed more than 25 million freight tonne-kilometres in 2009 [a])

Economy	Total operations		International operations	
	Rank	Million tonne-kilometres performed	Rank	Million tonne-kilometres performed
United States	1	35084	1	19937
China	2	11421	4	7020
Hong Kong, China		8229		8229
Macao, China		32		32
Republic of Korea	3	8551	2	8480
Japan	4	7018	6	6171
United Arab Emirates	5	7551	3	7551
Germany	6	6809	5	6801
United Kingdom	7	5864	7	5862
Singapore	8	5535	8	5535
France	9	4921	9	4751
Luxembourg	10	4651	10	4651
Netherlands	11	3960	11	3960
Russian Federation	12	2306	16	1814
Thailand	13	2091	12	2059
Malaysia	14	2064	13	2031
Australia	15	2032	15	1890
Qatar	16	1953	14	1953
Brazil	17	1782	24	915
Canada	18	1347	19	1069
India	19	1235	22	968
Chile	20	1179	17	1129
Memorandum				
World		140610		117050

[a] Most 2009 data are estimates, thus the ranking and the rate of increase or decrease may change when final data become available.
Source: ICAO Annual Report of the Council (2009).

Table SA-11 - Leading exporters and importers of travel, 2009
(Billion dollars and percentage)

	Value	Share in world exports/imports		Annual percentage change			
	2009	2000	2009	2000-09	2007	2008	2009
Exporters							
European Union (27)	341.4	42.0	39.2	6	14	8	-13
Extra-EU(27) exports	95.4	...	10.9	...	15	6	-14
United States	120.3	20.6	13.8	2	12	13	-11
China	39.7	3.4	4.6	10	10	10	-3
Australia	25.9	2.0	3.0	12	26	12	3
Turkey	21.3	1.6	2.4	12	10	19	-3
Macao, China	17.9	0.6	2.1	22	38	28	7
Hong Kong, China	16.4	1.2	1.9	12	18	11	7
Thailand	15.9	1.6	1.8	9	24	9	-12
Malaysia	15.4	1.1	1.8	13	35	9	1
Switzerland	14.0	1.4	1.6	9	13	19	-3
Canada	13.7	2.3	1.6	3	7	1	-13
Mexico	11.3	1.7	1.3	3	6	3	-15
Egypt	10.8	0.9	1.2	11	23	18	-2
India	10.6	0.7	1.2	13	24	10	-10
Japan	10.3	0.9	1.2	10	10	17	-5
Above 15	685.0	82.0	78.6	-	-	-	-
Importers							
European Union (27)	334.2	45.3	42.3	6	15	9	-15
Extra-EU(27) imports	120.5	...	15.3	...	17	8	-14
United States	79.1	15.4	10.0	2	6	5	-8
China	43.7	3.0	5.5	14	22	21	21
Japan	25.2	...	3.2	...	-1	...	6
Canada	24.2	2.9	3.1	8	20	10	-11
Russian Federation	20.8	2.0	2.6	10	17	12	-13
Kingdom of Saudi Arabia	18.8	...	2.4	...	55	-25	24
Australia	18.2	1.5	2.3	12	27	26	-3
Hong Kong, China	16.0	2.9	2.0	3	7	7	-1
Singapore	15.8	1.0	2.0	15	18	15	4
Korea, Republic of	13.3	1.6	1.7	7	17	-13	-30
Norway	12.3	1.1	1.6	11	21	13	-23
Brazil	10.9	0.9	1.4	12	42	34	-1
Switzerland	10.9	1.2	1.4	8	9	8	-1
United Arab Emirates	10.3	0.7	1.3	15	28	18	-22
Above 15	655.0	85.2	82.8	-	-	-	-

Source: IMF and WTO estimates based on national data.

Table SA-12 - Structure of travel exports in selected economies, 2008
(Million dollars)

Exporter	Total	Business travel	Personal travel		
			Total	Health-related expenditure	Education-related expenditure
European Union (27)	394432	75958	318474	...	...
Extra-EU(27) exports	110815	25480	85335	...	...
United States	134906	…	…	2467	17796
Australia	25062	2347	22716	…	12837
Turkey	21951	2837	19114	394	215
Macao, China	16758	1835	14922	...	...
Canada	15668	2866	12802	123	2581
Malaysia	15293	15056	237	6	231
Mexico	13289	751	12538	297	48
India	11832	...	11832	...	...
Russian Federation	11819	6969	4850	...	...
Croatia	11280	573	10708	118	44
Korea, Republic of	9774	4082	5692	70	54
South Africa	7956	1391	6565	...	...
Indonesia	7377	2213	5164	...	...
Morocco	7221	...	7221	...	...
Taipei, Chinese	5937	1451	4486	...	...
Lebanon	5819	178	5641	...	...
Brazil	5785	84	5701	36	11
Ukraine	5768	397	5371	...	...
New Zealand	5130	606	4525	8	1078

Source: IMF and WTO estimates based on national data.

Table SA-13 - Top 20 tourism destinations, 2009
(Million and percentage)

Rank	Destination	International tourist arrivals		Annual growth rate		Share of world arrivals
2009		2008	2009	2008	2009	2009
1	France	79.2	74.2	-2.0	-6.3	8.4
2	United States	57.9	54.9	3.5	-5.3	6.2
3	Spain	57.2	52.2	-2.5	-8.7	5.9
4	China	53.0	50.9	-3.1	-4.1	5.8
5	Italy	42.7	43.2	-2.1	1.2	4.9
6	United Kingdom	30.1	28.0	-2.4	-7.0	3.2
7	Turkey	25.0	25.5	12.3	2.0	2.9
8	Germany	24.9	24.2	1.9	-2.7	2.8
9	Malaysia	22.1	23.6	5.1	7.2	2.7
10	Mexico	22.6	21.5	5.9	-5.2	2.4
11	Austria	21.9	21.4	5.6	-2.6	2.4
12	Ukraine	25.4	20.7	9.8	-18.3	2.4
13	Russian Federation	21.6	19.4	4.7	-10.0	2.2
14	Hong Kong, China	17.3	16.9	1.0	-2.3	1.9
15	Canada	17.1	15.8	-4.4	-8.0	1.8
16	Greece	15.9	14.9	-1.4	-6.4	1.7
17	Thailand	14.6	14.1	0.8	-3.0	1.6
18	Egypt	12.3	11.9	15.9	-3.1	1.4
19	Poland	13.0	11.9	-13.5	-8.3	1.4
20	Kingdom of Saudi Arabia	14.8	10.9	28.0	-26.2	1.2

Source: World Tourism Organization (2010).

Table SA-14 - Leading exporters and importers of other commercial services, 2009
(Billion dollars and percentage)

	Value	Share in world exports/imports		Annual percentage change			
	2009	2000	2009	2000-09	2007	2008	2009
Exporters							
European Union (27)	868.2	45.1	48.8	13	24	12	-12
Extra-EU(27) exports	403.1	...	22.7	...	26	11	-9
United States	281.8	19.6	15.9	9	20	7	-4
Japan	83.9	6.0	4.7	9	10	17	-6
India	66.1	...	3.7	...	26	19	-17
China	65.3	1.6	3.7	23	46	27	-3
Switzerland	49.2	2.8	2.8	12	22	19	-11
Singapore	47.9	1.7	2.7	18	28	18	-6
Hong Kong, China	44.8	3.3	2.5	8	17	6	-6
Canada	34.9	3.2	2.0	6	10	6	-11
Russian Federation	19.5	0.4	1.1	25	34	34	-18
Korea, Republic of	18.9	1.4	1.1	8	31	-3	-12
Taipei, Chinese	18.2	1.8	1.0	5	9	13	-15
Norway	18.1	0.9	1.0	13	27	13	-7
Brazil	16.9	0.9	1.0	13	33	30	-4
Israel	15.1	1.3	0.8	6	6	10	1
Above 15	1650.0	91.5	92.7	-	-	-	-
Importers							
European Union (27)	715.5	46.0	47.1	11	21	12	-7
Extra-EU(27) imports	298.8	...	19.7	...	22	15	-6
United States	170.8	12.4	11.2	10	12	8	-2
Japan	81.2	8.0	5.3	6	14	17	-5
China	67.9	2.0	4.5	21	35	27	-5
Singapore	39.1	2.0	2.6	14	11	23	-3
Korea, Republic of	38.3	2.4	2.5	11	19	19	3
Canada	36.1	3.6	2.4	6	10	3	-9
India	35.9	...	2.4	...	17	15	0
Russian Federation	29.1	0.8	1.9	21	39	41	-21
Brazil	25.2	1.2	1.7	15	21	28	9
Switzerland	17.3	0.6	1.1	18	28	18	2
Thailand	16.4	1.0	1.1	12	24	22	-9
Norway	15.4	0.8	1.0	13	21	15	14
Kingdom of Saudi Arabia	15.3	...	1.0	...	...	...	-19
Hong Kong, China	14.8	1.0	1.0	11	20	11	-1
Above 15	1320.0	84.3	86.8	-	-	-	-

Source: IMF and WTO estimates based on national data.

Table SA-15 - Top 15 exporters and importers of communications services, 2008
(Million dollars and percentage)

Exporter	Value	Share in 15 economies	Annual percent-age change	Importer	Value	Share in 15 economies	Annual percent-age change
European Union (27)	46015	59.2	8	European Union (27)	42872	64.3	4
Extra-EU(27) exports	15814	20.4	15	Extra-EU(27) imports	15758	23.6	12
United States	9465	12.2	13	United States	7788	11.7	2
Kuwait [a]	6071	7.8	30	Canada	1910	2.9	0
India	2423	3.1	3	Russian Federation	1879	2.8	45
Canada	2421	3.1	9	China	1510	2.3	40
Egypt	1611	2.1	113	Singapore	1447	2.2	11
China	1570	2.0	34	Kingdom of Saudi Arabia	1269	1.9	59
Russian Federation	1493	1.9	17	Hong Kong, China	1188	1.8	10
Switzerland	1226	1.6	15	Korea, Republic of	1149	1.7	26
Singapore	1179	1.5	24	Japan	1075	1.6	5
Indonesia	1096	1.4	-18	India	1004	1.5	16
Hong Kong, China	882	1.1	2	Australia	978	1.5	28
Australia	795	1.0	33	Switzerland	972	1.5	21
Turkey [a]	725	0.9	43	Malaysia [a]	817	1.2	-4
Korea, Republic of	724	0.9	32	Egypt	785	1.2	67
Above 15	77695	100.0	-	*Above 15*	66645	100.0	-

[a] Telecommunications services.
Source: IMF and WTO estimates based on national data.

Table SA-16 - Structure of communications services exports in selected economies, 2008
(Million dollars)

Exporter	Total	Postal and courier serv.	Telecommunication serv.
European Union (27)	46015	8051	37964
Extra-EU(27) exports	15814	3195	12619
United States	9465	302	9163
Kuwait	6071	0	6071
India	2423	1211	1211
Russian Federation	1493	92	1401
Hong Kong, China	882	327	555
Turkey	725	0	725
Korea, Republic of	724	174	550
Norway	669	157	511
Morocco	641	8	632
Malaysia	602	0	602
Brazil	466	14	452
Kenya	437	2	435
Philippines	404	0	404
Argentina	362	96	265
Mexico	336	0	336
Lebanon	329	0	329
Croatia	318	6	311
Israel	275	0	275
Guatemala	273	1	272
Colombia	249	6	243
Panama	236	0	236
South Africa	210	24	186
Dominican Republic	160	14	146

Source: IMF and WTO estimates based on national data.

Table SA-17 - Top 15 exporters and importers of construction, 2008 - (Million dollars and percentage)

Exporter	Value	Share in 15 economies	Annual percent-age change	Importer	Value	Share in 15 economies	Annual percent-age change
European Union (27)	46706	54.0	19	European Union (27)	33312	42.0	25
Extra-EU(27) exports	25909	30.0	17	Extra-EU(27) imports	14034	17.7	32
Japan	13822	16.0	34	Japan	11359	14.3	43
China	10329	12.0	92	Russian Federation	8839	11.1	37
Russian Federation	4663	5.4	35	Angola	5007	6.3	90
United States [a]	1679	1.9	64	Kingdom of Saudi Arabia	4491	5.7	-29
Egypt	1345	1.6	37	China	4363	5.5	50
Iran, Islamic Rep. of	1330	1.5	1	Kazakhstan	3188	4.0	-27
Malaysia	1212	1.4	-11	Iran, Islamic Rep. of	2251	2.8	-9
Turkey	1146	1.3	34	Azerbaijan	1441	1.8	-2
Singapore	918	1.1	22	Malaysia	1412	1.8	-17
Israel	819	0.9	23	United States	827	1.0	41
India	722	0.8	-4	Thailand	786	1.0	23
Indonesia	667	0.8	45	India	755	1.0	4
Thailand	614	0.7	18	Indonesia	749	0.9	1
Norway	449	0.5	31	Libyan Arab Jamahiriya	531	0.7	...
Above 15	86420	100.0	-	*Above 15*	79310	100.0	-

[a] Data are presented net of merchandise exports by the United States for construction (203 million dollars) and net of outlays for wages, services, materials, and other expenses bought in the economy where the construction is taking place (2,766 million dollars).

Source: IMF and WTO estimates based on national data.

Table SA-18 - Top 15 exporters and importers of insurance services, 2008
(Million dollars and percentage)

Exporter	Value	Share in 15 economies	Annual percent-age change	Importer	Value	Share in 15 economies	Annual percent-age change
European Union (27)	44416	57.5	11	United States	42939	33.2	3
Extra-EU(27) exports	22419	29.0	12	European Union (27)	31991	24.7	1
United States	10756	13.9	6	Extra-EU (27) imports	10995	8.5	3
Switzerland	5724	7.4	19	China	12743	9.8	19
Canada	4179	5.4	10	Mexico	12274	9.5	12
Mexico	2011	2.6	1	Canada	6134	4.7	0
Singapore	1933	2.5	15	Japan	5124	4.0	24
India	1548	2.0	3	India	4252	3.3	34
China	1383	1.8	53	Singapore	2379	1.8	3
Japan	937	1.2	-30	Thailand	2377	1.8	24
Bahrain	916	1.2	12	Kingdom of Saudi Arabia	1820	1.4	84
Brazil	828	1.1	53	Brazil	1665	1.3	27
Turkey	752	1.0	17	Egypt	1584	1.2	24
Russian Federation	644	0.8	70	Angola	1498	1.2	262
Australia	626	0.8	5	Turkey	1436	1.1	-7
Hong Kong, China	547	0.7	17	Russian Federation	1249	1.0	48
Above 15	77200	100.0	-	*Above 15*	129465	100.0	-

Source: IMF and WTO estimates based on national data.

Table SA-19 - Top 15 exporters and importers of financial services, 2008 (Million dollars and percentage)

Exporter	Value	Share in 15 economies	Annual percent-age change	Importer	Value	Share in 15 economies	Annual percent-age change
European Union (27)	163708	57.5	2	European Union (27)	69535	60.0	2
Extra-EU(27) exports	72813	25.6	0	Extra-EU(27) imports	27330	23.6	1
United States	60190	21.1	-2	United States	19143	16.5	-3
Switzerland	19249	6.8	0	Japan	3982	3.4	10
Hong Kong, China	11818	4.2	-5	Canada	3888	3.4	-4
Singapore	6579	2.3	0	India	3552	3.1	10
Japan	5454	1.9	-12	Hong Kong, China	3137	2.7	12
India	4059	1.4	20	Russian Federation	2080	1.8	41
Korea, Republic of	3785	1.3	-5	Switzerland	2042	1.8	14
Canada	3076	1.1	-4	Singapore	1885	1.6	7
Russian Federation	1320	0.5	12	Kingdom of Saudi Arabia	1508	1.3	...
Norway	1274	0.4	25	Ukraine	1465	1.3	65
Brazil	1238	0.4	14	Brazil	1145	1.0	42
Taipei, Chinese	1146	0.4	-12	Turkey	978	0.8	57
Australia	901	0.3	5	Norway	956	0.8	-15
Turkey	841	0.3	113	Korea, Republic of	691	0.6	-1
Above 15	284635	100.0	-	*Above 15*	115985	100.0	-

Source: IMF and WTO estimates based on national data.

Table SA-20 - Top 15 exporters and importers of computer and information services, 2008
(Million dollars and percentage)

Exporter	Value	Share in 15 economies	Annual percent-age change	Importer	Value	Share in 15 economies	Annual percent-age change
European Union (27)	108399	58.3	20	European Union (27)	50116	55.5	13
Extra-EU(27) exports	42500	22.8	20	Extra-EU(27) imports	16866	18.7	13
India [a]	36041	19.4	...	United States	16139	17.9	9
United States	12599	6.8	8	Japan	3979	4.4	10
Israel [b]	6852	3.7	18	India	3419	3.8	-2
China	6252	3.4	44	China	3165	3.5	43
Canada	4882	2.6	6	Brazil	2787	3.1	23
Norway [b]	1953	1.0	73	Canada	2526	2.8	1
Russian Federation	1644	0.9	50	Norway [b]	1780	2.0	6
Australia	1418	0.8	10	Russian Federation	1424	1.6	49
Singapore	1334	0.7	32	Australia	1313	1.5	6
Philippines [b]	1148	0.6	276	Singapore	916	1.0	37
Malaysia [b]	1025	0.6	30	Malaysia [b]	896	1.0	39
Japan	946	0.5	-2	Indonesia	713	0.8	5
Argentina	897	0.5	37	Korea, Republic of	571	0.6	5
Costa Rica	694	0.4	39	Hong Kong, China	512	0.6	21
Above 15	186085	100.0	-	*Above 15*	90255	100.0	-

[a] Secretariat estimate.
[b] Computer services.
Source: IMF and WTO estimates based on national data.

Table SA-21 - Structure of exports of computer and information services, selected economies, 2008
(Million dollars)

Exporter	Total	Computer services	Information services		
			Total	News agency serv.	Other
European Union (27)	108399	97279	11120	...	...
Extra-EU(27) exports	42500	35440	7060	...	...
India [a]	36041	35288	753	753	...
United States	12599	8044	4555	...	...
Israel	6852	6852	...	...	...
Norway	1953	1953	...	...	...
Russian Federation	1644	1549	94	...	...
Philippines	1148	1148	...	...	...
Malaysia	1025	1025	...	...	...
Argentina	897	893	3	...	...
Costa Rica	694	693	0	...	...
Hong Kong, China	681	611	71	...	...
Korea, Republic of	304	155	149	12	137
Sri Lanka	230	230	...	...	...
Brazil	189	181	8	...	...
Pakistan	187	183	4	...	4
Uruguay	180	180	...	...	...
Morocco	156	147	9	...	9
Belarus	155	152	3	...	3
Serbia	141	141	...	...	...
Iraq	55	55	...	...	...

[a] Secretariat estimate for computer services.
Source: IMF and WTO estimates based on national data.

Table SA-22 - Top 15 exporters and importers of royalties and licence fees, 2008
(Million dollars and percentage)

Exporter	Value	Share in 15 economies	Annual percent-age change	Importer	Value	Share in 15 economies	Annual percent-age change
United States	91599	43.7	9	European Union (27)	91114	44.7	17
European Union (27)	68351	32.6	13	Extra-EU(27) imports	54755	26.9	16
Extra-EU(27) exports	35947	17.1	-1	United States	26616	13.1	8
Japan	25681	12.2	11	Japan	18274	9.0	10
Switzerland	12294	5.9	32	Singapore	12322	6.0	38
Canada	3569	1.7	2	Switzerland	11602	5.7	20
Korea, Republic of	2382	1.1	37	China	10320	5.1	26
Singapore	1433	0.7	17	Canada	8648	4.2	5
Israel	804	0.4	2	Korea, Republic of	5656	2.8	10
Australia	703	0.3	2	Russian Federation	4595	2.3	64
Norway	642	0.3	-8	Australia	3026	1.5	8
China	571	0.3	67	Taipei, Chinese	3015	1.5	17
Brazil	465	0.2	46	Brazil	2697	1.3	19
Russian Federation	453	0.2	14	Thailand	2559	1.3	12
Mexico	440	0.2	268	South Africa	1676	0.8	5
Hong Kong, China	380	0.2	6	Hong Kong, China	1610	0.8	7
Above 15	209765	100.0	-	*Above 15*	203730	100.0	-

Source: IMF and WTO estimates based on national data.

Table SA-23 - Top 15 exporters and importers of other business services, 2008
(Million dollars and percentage)

Exporter	Value	Share in 15 economies	Annual percent-age change	Importer	Value	Share in 15 economies	Annual percent-age change
European Union (27)	486689	54.7	14	European Union (27)	429859	59.0	14
Extra-EU(27) exports	221712	24.9	14	Extra-EU(27) imports	169387	23.3	17
United States	92202	10.4	12	United States	58419	8.0	16
China	46349	5.2	15	Japan	40612	5.6	17
Japan	41168	4.6	25	China	38597	5.3	27
Singapore	37558	4.2	21	Korea, Republic of	27245	3.7	25
India [a]	33764	3.8	...	India	21062	2.9	15
Hong Kong, China	33079	3.7	9	Singapore	20794	2.9	20
Taipei, Chinese	18925	2.1	16	Russian Federation	15975	2.2	38
Canada	18685	2.1	9	Canada	14235	2.0	8
Switzerland [b]	16896	1.9	41	Brazil	13557	1.9	28
Brazil	14331	1.6	30	Thailand [d]	12121	1.7	23
Norway	13551	1.5	8	Kingdom of Saudi Arabia [e]	9698	1.3	...
Russian Federation	13102	1.5	36	Angola	8766	1.2	39
Korea, Republic of	12965	1.5	-10	Norway	8653	1.2	22
Lebanon [c]	10545	1.2	67	Taipei, Chinese	8368	1.1	-10
Above 15	889810	100.0	-	*Above 15*	727960	100.0	-

[a] Secretariat estimate.
[b] Includes construction and computer and information services.
[c] Includes construction, computer and information services, royalties and license fees and personal, cultural and recreational services.
[d] Includes financial services, computer and information services and personal, cultural and recreational services.
[e] Includes computer and information services, royalties and license fees and personal, cultural and recreational services.
Source: IMF and WTO estimates based on national data.

Table SA-24 - Structure of exports of other business services in selected economies, 2008
(Million dollars and percentage)

Exporter	Value	Share								
				Miscellaneous business, professional and technical services						
	Total other business services	Merch-anting and other trade-related services	Opera-tional leasing services	Total	Legal, accounting, mana-gement and public rela-tions	Adverti-sing, market research and public opinion polling	Research and develop-ment	Architec-tural, enginee-ring and other technical services	Agri-cultu-ral, mining and other on-site proces-sing services	Other[a]
European Union (27)	486689	24.9	5.0	70.1	13.9	5.5	9.2	10.8	2.2	28.6
Extra-EU (27) exports	221712	23.4	4.5	72.0	13.7	4.7	11.1	13.9	3.0	25.8
United States [b]	92202	6.6	8.6	84.8	38.6	4.4	18.6	6.4	3.3	13.4
China	46349	56.1	...	43.9	39.1	4.8	...	...	...	...
Japan	41168	58.8	6.9	34.2	...	...	9.4	...	...	24.8
Singapore	37558	61.3	...	38.7	18.6	0.8	1.0	6.9	...	11.4
India [c]	33764	9.5	1.7	88.8	17.4	1.7	4.7	6.0	0.8	58.2
Hong Kong, China	33079	83.8	0.1	16.1	9.4	1.8	...	1.2	...	3.5
Canada	18685	5.2	2.3	92.5	29.7	3.7	18.5	25.6	...	15.0
Brazil	14331	9.5	0.4	90.1	18.7	2.3	2.2	39.0	0.2	27.6
Norway	13551	13.6	3.8	82.6	3.1	1.9	3.7	23.0	30.9	20.0
Russian Federation	13102	...	4.8	95.2	22.3	21.7	3.9	24.8	3.2	19.2
Korea, Republic of	12965	21.0	12.6	66.4	8.5	2.6	4.2	3.3	0.5	47.2
Australia	6347	13.3	1.4	85.3	17.1	4.4	7.7	25.2	4.6	26.3
Malaysia	4637	-3.0	12.6	90.4	...	...	...	...	...	...
Philippines	4182	0.7	0.3	99.0	98.5	...	0.5	...	...	...
Argentina	3568	8.8	5.1	86.1	30.7	10.8	7.0	4.7	0.4	32.6
Ukraine	2284	7.3	3.4	89.3	13.8	21.0	18.4	13.6	18.3	4.2
Chile	1759	44.1	12.0	43.9	...	...	...	...	...	...
Serbia	1216	7.6	0.9	91.5	13.7	19.7	3.9	11.3	0.1	42.9
Croatia	1211	12.0	3.3	84.7	20.6	21.7	6.3	30.7	4.9	0.5

[a] Covers other services not included elsewhere as well as services between related enterprises n.i.e.
[b] Market research and public opinion polling are included in "other".
[c] Secretariat estimates. Exports of "miscellaneous business, professional and technical services, other" includes information technology enabled services.
Source: IMF and WTO estimates based on national data.

Table SA-25 - Top 15 exporters and importers of personal, cultural and recreational services, 2008
(Million dollars and percentage)

Exporter	Value	Share in 15 economies	Annual percent-age change	Importer	Value	Share in 15 economies	Annual percent-age change
European Union (27)	17064	43.3	5	European Union (27)	21062	63.5	7
Extra-EU(27) exports	7196	18.3	10	Extra-EU(27) imports	8568	25.8	6
United States	14353	36.5	-5	United States	2191	6.6	20
Canada	2184	5.5	-5	Canada	2105	6.3	-3
Turkey	1224	3.1	26	Australia	1240	3.7	33
India	707	1.8	39	Japan	1213	3.7	-8
Australia	671	1.7	32	Korea, Republic of	891	2.7	-4
Norway	560	1.4	20	Brazil	869	2.6	33
Korea, Republic of	527	1.3	18	Russian Federation	838	2.5	11
Argentina	463	1.2	47	Norway	730	2.2	28
China [a]	418	1.1	32	Malaysia	474	1.4	...
Russian Federation	389	1.0	34	Bolivarian Rep. of Venezuela	452	1.4	37
Hong Kong, China	265	0.7	-2	India	296	0.9	75
New Zealand	196	0.5	-9	Singapore	284	0.9	-1
Ukraine	185	0.5	17	Iran, Islamic Rep. of	279	0.8	15
Singapore	168	0.4	-29	China [a]	255	0.8	66
Above 15	39375	100.0	-	*Above 15*	33180	100.0	-

[a] Audiovisual and related services.
Source: IMF and WTO estimates based on national data.

Table SA-26 - Structure of personal, cultural and recreational services exports in selected economies, 2008
(Million dollars)

Exporter	Total	Audio-visual and related services	Other personal, cultural and recreational services		
			Total	Education serv.	Health services
European Union (27)	17064	9894	7170	...	...
Extra-EU(27) exports	7196	3907	3288	...	...
United States	14353	13598	755	...	...
Canada	2184	1947	237	...	...
Turkey	1224	...	1224	...	...
India	707	...	707	...	...
Australia	671	194	477	417	6
Norway	560	275	285	...	...
Korea, Republic of	527	208	320	67	6
Argentina	463	447	16	...	...
China	418	418	...	...	...
Russian Federation	389	261	128	...	...
Hong Kong, China	265	228	37	...	...
Serbia	160	18	142	...	90
Japan	154	120	35	...	...
Croatia	130	25	105	...	...
Morocco	93	90	3	...	...
Mexico	87	87	...	...	...
Brazil	86	26	60	...	...
Egypt	74	...	74	...	...
Kyrgyz Republic	69	...	69	...	...

Source: IMF and WTO estimates based on national data.

Table SA-27 - Exports of commercial services by economy and category, 2008
(Million dollars)

	Total	Trans-port	Travel	Com-muni-cations	Cons-truc-tion	Insu-rance	Finan-cial	Com-puter and info.	Royalties and lic. fees	Other business	Personal cult. & recr.
Albania	2420	212	1714	150	24	5	69	19	39	174	13
Algeria	3480	...	...	...	...	...	...	...	...	...	...
Angola	329	14	285	...	0	...	...	...	12	5	13
Anguilla	115	3	102	3	...	2	...	...	...	5	...
Antigua and Barbuda	551	136	334	19	0	18	...	...	...	44	...
Argentina	11918	1837	4646	362	30	...	8	897	108	3568	463
Armenia	636	138	331	62	14	15	4	50	...	14	7
Aruba	1675	57	1411	17	3	1	5	0	0	181	...
Australia	44513	7923	25062	795	66	626	901	1418	703	6347	671
Austria	61447	13484	21630	1757	1707	1290	1565	2155	905	16652	301
Azerbaijan	1454	794	190	47	109	5	0	8	0	296	4
Bahamas	2503	53	2153	...	...	...	...	...	...	297	...
Bahrain	3740	761	1166	700	...	916	...	...	...	198	...
Bangladesh	899	115	75	111	7	12	30	30	0	519	1
Barbados	1731	31	1205	7	3	190	92	10	4	189	0
Belarus	4151	2929	363	147	99	2	16	155	6	424	10
Belgium	85373	27671	11801	3897	1301	1267	3996	3734	1177	29940	589
Belize	355	25	278	12	...	0	2	...	...	38	...
Benin	328	13	236	2	0	6	1	0	0	70	0
Bhutan	55	...	...	...	...	...	...	...	...	...	...
Bolivarian Rep. of Venezuela	2003	738	917	152	...	2	...	9	...	179	6
Bolivia	482	63	275	61	0	49	13	1	2	16	2
Bosnia and Herzegovina	1658	329	826	146	246	13	3	...	5	92	...
Botswana	878	84	513	26	11	29	4	1	1	210	...
Brazil	28822	5411	5785	466	23	828	1238	189	465	14331	86
Brunei Darussalam	867	429	242	21	...	13	...	...	...	162	...
Bulgaria	7988	1826	4306	260	249	58	48	187	11	966	77
Burkina Faso	166	...	...	...	...	...	...	...	...	...	...
Burundi	3	1	1	...	...	0	0	...	...	1	...
Cambodia	1613	238	1219	45	8	0	6	1	1	92	2
Cameroon	1355	553	156	97	5	46	12	1	0	458	26
Canada	66378	11483	15668	2421	231	4179	3076	4882	3569	18685	2184
Cape Verde	575	180	352	30	0	8	1	0	...	3	0
Central African Republic	29	...	...	...	...	...	...	...	...	...	...
Chad	94	...	...	...	...	...	...	...	...	...	...
Chile	10677	6503	1674	165	...	258	47	96	64	1759	111
China	146446	38418	40843	1570	10329	1383	315	6252	571	46349	418
Colombia	4058	1239	1844	249	...	...	70	47	30	535	45
Comoros	59	6	38	15	0	0	0	0	0	0	0
Congo	364	...	...	...	...	...	...	...	...	...	...
Congo, Dem. Rep. of	522	...	...	...	...	...	...	...	...	...	...
Costa Rica	4055	371	2276	39	...	...	14	694	1	660	0
Côte d'Ivoire	856	235	116	106	31	42	67	6	0	253	...
Croatia	15160	1788	11280	318	155	33	49	152	44	1211	130
Cuba	9252	...	2258	...	...	...	...	...	...	...	...
Cyprus	11776	3508	2770	131	170	182	2727	235	12	1985	55
Czech Republic	21751	6264	7204	588	469	109	181	1344	55	5414	122

	Total	Trans-port	Travel	Com-muni-cations	Cons-truc-tion	Insu-rance	Finan-cial	Com-puter and info.	Royalties and lic. fees	Other business	Personal cult. & recr.
Denmark	72468	47658	6806	819	427	594	168	1535	2813	11044	605
Djibouti	129	107	8	7	...	...	...	...	...	8	...
Dominica	106	5	72	12	...	3	...	...	...	16	...
Dominican Republic	4866	381	4176	160	...	27	16	14	...	92	...
Ecuador	1223	366	742	68	...	...	...	...	...	...	47
Egypt	24668	8160	10985	1611	1345	216	269	219	...	1789	74
El Salvador	1483	351	894	154	33	30	1	1	1	19	...
Equatorial Guinea	33	...	...	...	...	...	...	...	...	...	...
Estonia	5105	2017	1189	196	360	15	89	174	27	1021	17
Ethiopia	1775	1048	377	75	25	1	22	2	0	225	0
Faeroe Islands	252	128	63	27	2	0	1	1	0	24	5
Fiji	973	369	546	25	...	1	0	2	...	29	1
Finland	31729	3653	3220	494	1317	174	635	8190	1488	...	12
France	166429	41125	57236	4533	6610	738	1961	1852	11034	39101	2240
French Polynesia	1083	254	522	43	0	5	4	...	0	237	18
FYR Macedonia	992	327	228	80	64	8	5	50	6	205	18
Gabon	195	...	...	...	...	...	...	...	...	...	...
Gambia	123	21	83	11	6	1	...	1	...	...	...
Georgia	1157	614	447	24	2	15	10	4	6	27	9
Germany	256240	64443	40021	5281	15798	4591	13328	15306	10020	86388	1065
Ghana	1559	240	919	...	...	13	...	...	...	387	...
Greece	50377	28316	17416	496	387	444	160	352	44	2540	222
Grenada	151	14	109	13	...	5	...	...	0	11	...
Guatemala	1732	255	1068	273	...	22	6	11	12	85	...
Guinea	99	12	2	12	41	0	4	0	0	26	2
Guinea-Bissau	40	...	...	...	...	...	...	...	...	...	...
Guyana	212	9	59	34	...	8	...	5	43	53	...
Haiti	288	...	276	...	...	...	...	...	3	...	...
Honduras	903	52	621	131	0	48	21	0	0	17	12
Hong Kong, China	92048	28886	15307	882	203	547	11818	681	380	33079	265
Hungary	20134	3991	6033	545	612	29	251	1132	864	5678	999
Iceland	2184	937	624	11	...	15	3	85	0	497	12
India [a]	102562	11318	11832	2423	722	1548	4059	36041	148	33764	707
Indonesia	14731	2800	7377	1096	667	20	304	178	27	2184	77
Iran, Islamic Rep. of	7285	3497	1908	66	1330	52	54	64	6	208	100
Iraq	1739	788	844	31	...	...	3	55	...	16	3
Ireland	101580	4464	6342	771	...	12585	10101	34162	1321	...	...
Israel	24061	5168	4056	275	819	24	...	6852	804	6065	...
Italy	118398	18345	46192	2442	3168	1717	4451	1141	864	38853	1225
Jamaica	2762	469	1976	136	...	11	43	29	17	45	39
Japan	146514	46794	10900	657	13822	937	5454	946	25681	41168	154
Jordan	4353	836	2943	...	...	...	...	...	...	575	...
Kazakhstan	3981	2242	1012	98	18	83	113	8	...	407	1
Kenya	2520	1285	752	437	...	10	...	1	33	...	2
Kingdom of Saudi Arabia	9132	2389	5910	222	...	143	434	...	...	34	...
Kiribati	13	...	...	...	...	...	...	...	...	...	...
Korea, Republic of	75973	44768	9774	724	278	466	3785	304	2382	12965	527
Kuwait	10301	3852	257	6071	...	65	56	...	...	...	...
Kyrgyz Republic	884	146	514	16	21	8	14	1	3	91	69
Lao People's Dem. Rep.	372	56	276	32	...	8	...	...	...	...	...

	Total	Trans-port	Travel	Com-muni-cations	Cons-truc-tion	Insu-rance	Finan-cial	Com-puter and info.	Royalties and lic. fees	Other business	Personal cult. & recr.
Latvia	4496	2303	803	99	87	16	288	139	13	736	12
Lebanon	17558	499	5819	329	...	266	100	...	...	10545	...
Lesotho	60	1	34	5	...	0	...	...	20	0	...
Liberia	182	19	158	...	...	...	...	...	...	5	...
Libyan Arab Jamahiriya	208	118	74	11	...	5	...	...	...	...	...
Lithuania	4767	2840	1343	107	96	5	54	40	1	263	18
Luxembourg	70927	4182	4489	2902	613	3132	44586	1309	336	8476	902
Macao, China	17517	432	16758	98	...	20	66	...	...	144	...
Madagascar	906	272	354	...	...	...	...	...	...	...	...
Malaysia	30283	6766	15293	602	1212	371	87	1025	199	...	...
Maldives	687	40	636	...	...	1	...	...	10	...	...
Mali	442	32	275	105	2	1	2	0	0	24	0
Malta	3680	522	959	68	...	39	214	47	171	928	733
Mauritania	104	...	...	...	...	...	...	...	...	...	...
Mauritius	2530	446	1454	77	10	15	48	16	0	459	6
Mexico	18474	2312	13289	336	...	2011	...	...	440	...	87
Moldova	817	357	212	115	15	2	5	26	4	81	0
Montenegro	1105	135	755	45	80	3	5	4	2	58	18
Montserrat	14	1	7	3	...	0	...	...	...	2	...
Morocco	12840	2500	7221	641	61	112	40	156	0	2016	93
Mozambique	488	158	190	31	18	1	3	3	0	83	1
Namibia	538	115	382	13	...	3	15	0	...	9	...
Nepal	494	27	335	45	...	1	...	...	...	87	...
Netherlands	102710	30999	13346	4512	3239	707	1500	6684	4870	36107	745
Netherlands Antilles	2028	142	1163	25	54	...	...	6	...	...	...
New Caledonia	435	140	152	2	28	1	10	1	1	94	6
New Zealand	8997	1967	5130	217	5	32	85	227	178	954	196
Nicaragua	357	45	276	32	...	4	...	...	...	...	...
Niger	126	12	79	15	0	1	7	0	0	11	1
Nigeria	1834	1209	569	30	...	0	15	...	...	10	...
Norway	45595	21630	4633	669	449	234	1274	1953	642	13551	560
Oman	1974	468	804	99	...	16	...	...	...	588	...
Pakistan	2529	1227	316	91	42	72	55	187	38	500	1
Panama	5756	3097	1408	236	3	91	485	24	...	413	...
Papua New Guinea	363	...	...	...	...	...	...	...	...	...	...
Paraguay	1052	195	109	13	...	20	3	0	282	428	...
Peru	3515	819	1991	125	...	227	47	20	2	280	4
Philippines	9715	1295	2499	404	90	17	59	1148	0	4182	21
Poland	35428	10949	11768	655	1899	155	566	938	204	8087	207
Portugal	26045	6963	10980	845	960	151	331	393	64	5059	298
Romania	12818	3942	1991	1153	462	45	485	880	240	3543	77
Russian Federation	50551	15024	11819	1493	4663	644	1320	1644	453	13102	389
Rwanda	326	56	202	...	...	0	6	...	62	...	...
Saint Kitts and Nevis	155	14	110	7	0	3	...	...	...	21	...
Saint Lucia	362	18	311	6	...	5	...	...	...	22	...
Saint Vincent and the Grenadines	150	11	96	8	...	3	...	...	...	32	...
Sao Tome and Principe	9	0	8	1	...	...	0	...	...	0	...
Senegal	1470	...	...	...	...	...	...	...	...	...	...
Serbia	4002	960	944	128	359	25	42	141	27	1216	160

	Total	Trans-port	Travel	Com-muni-cations	Cons-truc-tion	Insu-rance	Finan-cial	Com-puter and info.	Royalties and lic. fees	Other business	Personal cult. & recr.
Seychelles	472	172	269	8	...	1	...	...	9	13	...
Sierra Leone	61	20	34	0	...	0	1	...	1	5	...
Singapore	97307	35484	10722	1179	918	1933	6579	1334	1433	37558	168
Slovak Republic	8435	2914	2589	312	183	43	205	303	164	1623	100
Slovenia	7417	2117	2857	304	439	117	37	196	41	1282	27
Solomon Islands	54	7	37	7	0	0	2	0	0	0	...
South Africa	12394	1557	7956	210	58	251	805	203	54	1201	99
Spain	142515	24286	61978	2192	5399	1399	5731	6119	801	32853	1756
Sri Lanka	1981	998	342	81	41	68	...	230	...	222	...
Sudan	457	17	331	5	7	...	71	1	...	25	0
Suriname	233	19	77	...	...	1	...	...	...	135	...
Sweden	71829	12625	12738	1968	900	1226	1840	7841	5043	27036	613
Switzerland	76349	6493	14464	1226	...	5724	19249	...	12294	16896	4
Syrian Arab Republic	3770	192	3150	136	...	47	100	40	...	65	40
Taipei, Chinese	34490	7132	5937	334	235	350	1146	141	191	18925	99
Tajikistan	134	47	4	39	...	...	17	0	1	25	...
Tanzania	2136	365	1354	40	...	23	1	4	...	338	10
Thailand	33056	7282	18163	416	614	428	...	...	101	6052	...
Togo	253	109	40	52	3	2	11	1	...	36	0
Tonga	34	5	19	1	0	...	1	0	...	7	1
Tunisia	5831	1895	2953	109	297	42	86	35	32	374	6
Turkey	34536	7793	21951	725	1146	752	841	13	...	91	1224
Uganda	705	57	498	32	...	8	19	24	3	65	...
Ukraine	17302	7626	5768	281	220	64	486	316	72	2284	185
United Arab Emirates	8958	1797	7162	...	...	...	...	...	...	...	...
United Kingdom	285123	39800	36424	9428	2286	13473	68637	13583	13904	83369	4220
United States	518316	90567	134906	9465	1679	10756	60190	12599	91599	92202	14353
Uruguay	2192	650	1054	20	...	4	83	180	0	201	0
Uzbekistan	1196	...	...	...	...	...	...	...	...	...	...
Vanuatu	213	...	...	...	...	...	...	...	...	...	...
Viet Nam	6956	2356	3930	80	...	60	230	...	...	...	...
Yemen	1049	45	886	105	...	...	...	...	9	4	...
Zambia	297	105	146	15	...	10	9	9	...	3	...

[a] WTO Secretariat estimates for "computer and information services" and "other business services".
Source: *Balance of Payments Statistics*, IMF (2010), national statistics and WTO Secretariat estimates.

Table SA-28 - Imports of commercial services by economy and category, 2008
(Million dollars)

	Total	Trans-port	Travel	Com-muni-cations	Cons-truc-tion	Insu-rance	Finan-cial	Com-puter and info.	Royal-ties and lic. fees	Other business	Personal cult. & recr.
Albania	2361	350	1555	80	6	120	30	23	12	145	40
Algeria	11063	...	...	...	...	...	...	...	...	...	...
Angola	20020	3721	254	88	5007	1498	537	27	0	8766	121
Anguilla	87	33	17	3	4	6	...	0	1	23	...
Antigua and Barbuda	264	102	58	7	11	58	...	0	2	27	...
Argentina	12729	3849	4561	432	28	424	84	372	1291	1448	240
Armenia	952	469	324	20	5	73	7	7	...	36	11
Aruba	1093	442	322	36	47	1	14	17	12	201	...
Australia	47613	14820	18729	978	...	812	540	1313	3026	6155	1240
Austria	42738	13677	11432	1330	1532	1121	738	1741	1598	8641	929
Azerbaijan	3826	683	341	28	1441	53	13	12	5	1246	7
Bahamas	1306	361	305	1	34	107	...	...	18	479	2
Bahrain	2030	905	503	35	...	429	...	...	...	158	...
Bangladesh	3496	3032	184	16	0	19	25	5	22	192	0
Barbados	919	258	80	4	10	351	60	9	32	114	0
Belarus	2597	1283	668	85	53	5	76	35	79	289	24
Belgium	82932	23472	19825	3034	976	1111	3379	2699	1935	25759	743
Belize	161	69	41	3	...	22	4	1	1	20	1
Benin	500	310	64	8	18	22	3	7	3	65	1
Bhutan	161	...	...	...	...	...	...	...	...	...	...
Bolivarian Rep. of Venezuela	10073	4849	1784	293	...	532	80	79	349	1655	452
Bolivia	1018	424	281	22	18	127	3	17	18	99	10
Bosnia and Herzegovina	632	274	211	65	16	30	12	5	11	9	...
Botswana	1348	464	488	32	12	46	2	10	13	281	...
Brazil	44396	10405	10962	299	9	1665	1145	2787	2697	13557	869
Brunei Darussalam	1181	421	459	15	...	14	7	...	7	258	...
Bulgaria	5945	1461	2311	133	359	136	123	67	95	1241	20
Burkina Faso	783	...	...	...	...	...	...	...	...	...	...
Burundi	173	67	91	...	...	3	4	...	...	8	...
Cambodia	935	608	97	50	75	44	4	2	6	43	5
Cameroon	2571	798	410	124	16	137	29	9	16	1029	2
Canada	87953	20986	27210	1910	311	6134	3888	2526	8648	14235	2105
Cape Verde	349	161	133	7	...	17	2	5	0	23	1
Central African Republic	165	...	...	...	...	...	...	...	...	...	...
Chad	2004	...	...	...	...	...	...	...	...	...	...
Chile	11386	6765	1397	170	...	646	452	71	513	1325	47
China	158004	50329	36157	1510	4363	12743	566	3165	10320	38597	255
Colombia	7109	3008	1739	202	7	422	136	118	263	1171	41
Comoros	79	49	17	1	0	8	0	0	0	3	1
Congo	3767	...	...	...	...	...	...	...	...	...	...
Congo, Dem. Rep. of	2146	...	...	...	...	...	...	...	...	...	...
Costa Rica	1878	683	593	110	...	149	12	6	62	263	0
Côte d'Ivoire	2487	1513	356	80	8	77	139	7	21	286	1
Croatia	4517	1032	1113	180	14	66	100	268	257	1353	133
Cuba	2090	...	...	...	...	...	...	...	...	...	...
Cyprus	4863	1780	1571	163	35	127	474	44	49	542	78
Czech Republic	17766	4457	4585	620	391	367	602	910	747	4916	170

	Total	Trans-port	Travel	Com-muni-cations	Cons-truc-tion	Insu-rance	Finan-cial	Com-puter and info.	Royal-ties and lic. fees	Other business	Personal cult. & recr.
Denmark	62432	33838	9964	932	371	361	206	1957	1552	11427	1825
Djibouti	119	89	4	...	...	12	...	...	...	13	...
Dominica	69	35	11	3	3	8	...	0	1	7	...
Dominican Republic	1757	1172	314	44	...	113	28	12	33	42	...
Ecuador	2885	1634	542	5	...	179	5	...	47	338	137
Egypt	16335	7321	2915	785	335	1584	72	79	322	2843	80
El Salvador	1972	949	624	45	14	189	12	5	34	100	1
Equatorial Guinea	1419	...	...	...	...	...	...	...	...	...	...
Estonia	3308	1253	808	204	110	1	51	97	50	720	15
Ethiopia	2379	1612	156	19	291	97	0	4	2	198	0
Faeroe Islands	374	84	117	21	43	5	1	10	10	51	34
Fiji	593	381	96	15	0	35	1	16	2	43	3
Finland	30388	7649	4501	540	604	358	145	1909	2036	...	82
France	140956	42433	41570	3135	2560	1805	1925	2249	5453	36155	3671
French Polynesia	790	342	159	19	1	17	21	0	2	220	11
FYR Macedonia	970	406	136	48	12	26	7	63	25	232	16
Gabon	1632	...	...	...	...	...	...	...	...	...	...
Gambia	88	41	8	2	0	7	...	5	...	25	...
Georgia	1154	642	203	13	18	151	16	11	8	74	18
Germany	289676	70849	91598	7104	11298	4139	7473	13675	12581	68015	2945
Ghana	2038	1105	542	...	...	108	...	...	...	283	...
Greece	24392	13736	3930	653	272	1476	262	469	713	2423	456
Grenada	106	55	11	4	6	15	...	0	3	13	...
Guatemala	2116	1146	607	32	...	204	11	8	62	40	5
Guinea	398	267	9	19	31	15	1	7	0	50	...
Guinea-Bissau	73	...	...	...	...	...	...	...	...	...	...
Guyana	323	117	52	22	...	24	...	5	23	80	...
Haiti	561	478	64	12	...	...	7	...	0	...	...
Honduras	1204	722	344	43	0	38	13	4	18	14	10
Hong Kong, China	46918	15831	16093	1188	165	726	3137	512	1610	7517	140
Hungary	18560	3604	4037	567	408	202	304	804	2008	5708	917
Iceland	2511	805	1103	31	12	21	16	21	4	488	10
India	87395	41875	9602	1004	755	4252	3552	3419	1578	21062	296
Indonesia	27994	13895	5554	776	749	683	342	713	1328	3829	126
Iran, Islamic Rep. of	17076	4095	8685	218	2251	56	223	335	168	766	279
Iraq	6984	4087	732	98	143	793	620	39	395	49	28
Ireland	109290	2751	10425	1274	...	9562	6335	1009	30082	...	...
Israel	19629	6623	3439	283	...	466	...	...	1107	7711	...
Italy	127861	29423	30927	2972	4724	3366	1312	2021	1811	49060	2246
Jamaica	2304	1114	268	56	5	195	42	24	48	546	6
Japan	163270	53937	23716	1075	11359	5124	3982	3979	18274	40612	1213
Jordan	3926	2240	1004	...	...	339	...	...	...	343	...
Kazakhstan	10915	2369	1078	121	3188	263	324	89	87	3372	25
Kenya	1663	860	266	189	...	80	34	2	28	203	1
Kingdom of Saudi Arabia	49571	15656	15129	1269	4491	1820	1508	...	...	9698	...
Kiribati	37	...	...	...	...	...	...	...	...	...	...
Korea, Republic of	92915	36770	19065	1149	133	744	691	571	5656	27245	891
Kuwait	12149	4289	7570	23	61	199	6	...	...	...	...
Kyrgyz Republic	988	489	304	13	10	11	9	15	15	85	38
Lao People's Dem. Rep.	303	239	16	9	27	11	...	...	...	...	...

	Total	Trans-port	Travel	Com-muni-cations	Cons-truc-tion	Insu-rance	Finan-cial	Com-puter and info.	Royal-ties and lic. fees	Other business	Personal cult. & recr.
Latvia	3163	823	1142	113	216	40	105	101	36	555	32
Lebanon	13445	1943	3564	249	...	301	27	0	...	7360	0
Lesotho	85	68	14	4	...	...	...	...	...	0	...
Liberia	323	210	30	...	...	10	...	...	...	47	26
Libyan Arab Jamahiriya	3572	1485	1277	36	531	242	...	...	...	...	...
Lithuania	4133	2001	1497	113	58	57	46	39	34	279	8
Luxembourg	41273	2023	3841	1416	784	1877	22353	776	543	6839	820
Macao, China	3467	275	554	65	...	101	26	42	102	2302	...
Madagascar	1470	626	149	...	...	...	...	...	...	...	...
Malaysia	30060	11391	6709	817	1412	728	301	896	1268	6065	474
Maldives	344	191	109	...	...	17	...	...	...	27	...
Mali	1022	645	147	55	45	43	5	6	2	73	2
Malta	2283	309	431	57	...	119	319	91	45	896	18
Mauritania	724	...	...	...	...	...	...	...	...	...	...
Mauritius	1910	646	452	31	21	70	36	6	6	603	40
Mexico	24701	3464	8526	94	...	12274	116	...	...	...	227
Moldova	779	325	274	47	10	15	7	16	15	70	1
Montenegro	501	123	43	12	95	18	6	22	11	136	34
Montserrat	17	7	3	3	...	1	...	0	0	3	...
Morocco	5628	2647	1090	92	6	135	31	35	15	1549	28
Mozambique	918	377	208	28	34	4	9	6	2	248	1
Namibia	581	237	114	0	24	18	5	19	15	149	...
Nepal	840	332	381	4	...	31	...	...	...	93	...
Netherlands	91918	22614	21825	3963	1731	1197	1736	5733	3529	28862	728
Netherlands Antilles	870	118	315	33	87	...	...	21	...	...	...
New Caledonia	1389	392	168	12	80	32	2	26	5	601	72
New Zealand	9553	3182	2983	217	110	224	104	339	573	1753	66
Nicaragua	572	309	142	6	...	58	...	...	...	58	...
Niger	599	400	68	14	42	16	6	6	0	48	0
Nigeria	...	6869	...	234	67	1014	32	222	190	4169	0
Norway	43928	14487	15932	509	69	102	956	1780	712	8653	730
Oman	6122	2541	858	55	...	442	...	...	...	2226	...
Pakistan	9285	4210	1518	128	55	129	214	113	117	2801	...
Panama	2550	1543	366	86	...	86	319	...	38	113	...
Papua New Guinea	1751	...	...	...	...	...	...	...	...	...	...
Paraguay	566	374	124	4	...	45	7	2	2	7	...
Peru	5473	2521	1067	134	156	379	86	169	159	784	19
Philippines	8348	4209	2057	147	33	262	82	80	382	1070	26
Poland	30035	7185	9903	821	1245	500	865	982	1770	6436	328
Portugal	16230	5104	4328	762	235	294	380	505	492	3524	606
Romania	11776	3978	2176	850	591	240	280	738	346	2376	201
Russian Federation	73616	12960	23778	1879	8839	1249	2080	1424	4595	15975	838
Rwanda	504	284	70	2	3	2	...	1	...	142	0
Saint Kitts and Nevis	119	58	15	4	4	15	...	0	2	21	...
Saint Lucia	209	94	45	3	10	17	...	...	3	37	...
Saint Vincent and the Grenadines	96	49	18	2	...	12	...	0	3	13	...
Sao Tome and Principe	19	17	0	0	...	1	0	...	...	0	...
Senegal	1722	...	...	...	...	...	...	...	...	...	...
Serbia	4239	1266	1253	117	128	49	69	204	195	869	89

	Total	**Trans-port**	**Travel**	**Com-muni-cations**	**Cons-truc-tion**	**Insu-rance**	**Finan-cial**	**Com-puter and info.**	**Royal-ties and lic. fees**	**Other business**	**Personal cult. & recr.**
Seychelles	330	189	37	3	41	30	...	...	1	29	...
Sierra Leone	117	55	24	12	...	11	0	2	1	12	...
Singapore	86190	30682	15135	1447	347	2379	1885	916	12322	20794	284
Slovak Republic	9084	2466	2165	229	507	132	857	331	182	2071	144
Slovenia	4944	1248	1314	317	227	131	39	179	250	1213	24
Solomon Islands	113	42	34	6	2	5	3	2	1	16	0
South Africa	16515	7594	4404	248	7	584	127	194	1676	1671	10
Spain	104365	25834	20363	3233	2992	2170	5249	2848	3336	35712	2628
Sri Lanka	2975	1968	428	55	6	188	...	...	...	331	...
Sudan	2552	1289	1188	34	0	10	6	4	0	16	4
Suriname	367	90	30	...	...	8	...	...	3	236	...
Sweden	53318	9278	15391	1840	1226	...	613	3035	1968	19680	287
Switzerland	36277	8328	10973	972	...	1007	2042	...	11602	1247	106
Syrian Arab Republic	3127	1816	800	41	15	200	80	85	30	40	20
Taipei, Chinese	34292	11417	9116	413	235	932	328	284	3015	8368	184
Tajikistan	453	179	11	33	128	22	25	3	0	51	...
Tanzania	1576	658	721	6	24	62	3	5	0	95	2
Thailand	46029	22965	5003	219	786	2377	...	...	2559	12121	...
Togo	358	253	19	20	1	35	1	7	5	17	0
Tonga	44	28	9	1	0	1	1	0	...	2	1
Tunisia	3226	1866	458	33	329	192	73	20	12	232	11
Turkey	16637	7927	3506	298	172	1436	978	32	729	1378	181
Uganda	1233	884	156	22	...	91	5	12	2	61	...
Ukraine	15777	6640	4023	144	71	146	1465	272	754	2031	231
United Arab Emirates	42773	25479	13288	...	...	...	...	...	...	...	...
United Kingdom	196896	35767	69792	8135	1974	2068	13667	6274	10615	46570	2033
United States	364930	104740	86128	7788	827	42939	19143	16139	26616	58419	2191
Uruguay	1365	693	358	18	...	38	12	5	8	224	10
Uzbekistan	427	...	...	...	...	...	...	...	...	...	...
Vanuatu	90	...	...	...	...	...	...	...	...	...	...
Viet Nam	7881	4974	1300	54	...	473	230	...	...	...	...
Yemen	2289	1108	183	25	349	209	...	5	...	...	...
Zambia	881	507	64	7	150	92	4	4	1	51	...

Source: *Balance of Payments Statistics*, IMF (2010), national statistics and WTO Secretariat estimates.

Table SA-29 - Sales by affiliates of foreign companies - resident affiliates primarily engaged in services activities (inward FATS), 2004-2007
(Billion dollars and percentage)

	Value				Annual percentage change			
	2004	**2005**	**2006**	**2007**	**2000-04**	**2005**	**2006**	**2007**
Austria [a]	...	...	...	62	...	...	...	...
Belgium	*28*	*29*	...	...	...	*3*	...	...
Bulgaria [b]	...	...	4	...	...	...	...	...
Cyprus [b, c]	1	1	1	...	...	8	14	...
Czech Republic	23	28	31	43	36	24	7	40
Denmark [b]	...	...	*29*	...	...	...	...	...
Estonia	*2*	*2*	*2*	...	...	*26*	*18*	...
Finland	...	...	...	22	...	...	...	...
France	*129*	*148*	*161*	*176*	...	*15*	*9*	*9*
Germany	...	188	200	...	...	...	6	...
Hong Kong, China [d]	83	92	114	142	...	10	24	25
Hungary	12	13	18	...	...	10	36	...
Ireland	*19*	*27*	*33*	...	...	*43*	*24*	...
Israel [b]	*4*	*6*	...	...	...	*41*	...	...
Italy	*72*	*78*	*95*	*110*	...	*8*	*22*	*16*
Japan [e]	*21*	*33*	*27*	...	...	*60*	*-19*	...
Latvia [b]	*1*	*2*	*2*	*3*	...	*35*	*32*	*34*
Lithuania [b]	*2*	*2*	*3*	...	...	*23*	*25*	...
Netherlands [a, b]	...	...	...	90	...	...	...	...
New Zealand [f]	12	...	...	...	...	...	...	...
Norway [b]	*19*	*24*	*28*	*33*	...	*29*	*19*	*14*
Poland	*9*	*11*	*19*	...	...	*25*	*71*	...
Portugal [b]	*8*	*10*	*14*	*19*	...	*33*	*37*	*36*
Romania [b]	*5*	...	*10*	*15*	...	...	...	*47*
Slovak Republic [b]	*5*	*6*	*7*	*10*	...	*34*	*2*	*47*
Slovenia [b]	*1*	...	*2*	...	...	...	...	...
Spain [b]	...	...	...	168	...	...	...	...
Sweden	*43*	*46*	*53*	*66*	*23*	*6*	*15*	*24*
United Kingdom	*222*	*253*	*284*	...	...	*14*	*12*	...
United States	...	...	...	897	...	...	...	...

Excluding wholesale and retail trade as well as repair activities. *For economies shown in italics data exclude all or a large part of financial intermediation activities.*
[a] Only direct control.
[b] Some or all community, social and personal services activities are not covered.
[c] Hotels and restaurants activities are not covered.
[d] Includes other income.
[e] No estimation for non-response. Real estate activities are also not covered.
[f] Refers to 2003. Preliminary results based on 53 per cent of foreign affiliates.
Note: Given the recent development of this statistical framework, comparability and coverage of data may not always be complete.

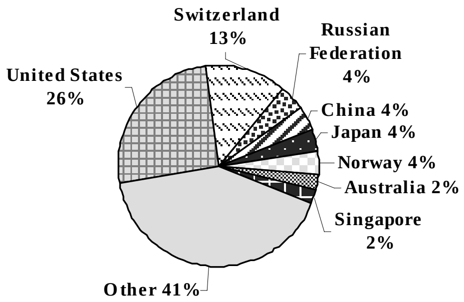
Table SA-30 - Sales by foreign affiliates of resident companies - affiliates located abroad primarily engaged in services activities (outward FATS), 2004-2007
(Billion dollars and percentage)

	Value				Annual percentage change			
	2004	**2005**	**2006**	**2007**	**2000-04**	**2005**	**2006**	**2007**
Austria [a]	...	...	30	31	...	...	...	4
Belgium [a, b]	42	48	...	...	31	14	...	...
Bulgaria	...	...	...	0	...	...	...	...
Canada [c]	*75*	*82*	*96*	*117*	*-3*	*9*	*18*	*22*
Cyprus	...	...	...	4	...	...	...	...
Czech Republic [d]	0	1	1	...	9	139	28	...
Finland [e]	13	12	19	24	...	-4	51	29
France [f]	...	...	...	362	...	...	...	...
Germany	...	400	434	497	...	...	8	15
Greece	...	*4*	*3*	*4*	...	...	*-16*	*32*
Hungary [e]	*0*	...	...	*1*	...	...	...	...
Israel [e]	*3*	*3*	...	...	...	*14*	...	...
Italy	...	115	125	159	...	...	9	27
Japan	*44*	*53*	*57*	...	...	*20*	*7*	...
Latvia [a, g]	...	...	0	0	...	...	...	-3
Portugal [a]	7	10	13	20	8	40	29	59
Slovak Republic [e]	...	*0*	*0*	*0*	...	...	*18*	*44*
Sweden [e]	...	...	...	20	...	...	...	...
United States	*584*	*669*	*763*	*876*	*8*	*15*	*14*	*15*

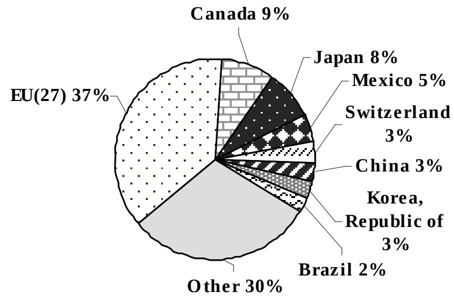
Excluding wholesale and retail trade and repair activities. *Economies shown in italics exclude most or a large part of financial intermediation activities.*
[a] Only includes affiliates directly owned.
[b] Classified under services according to activity of parent company.
[c] Branches are excluded.
[d] Only the first level of indirect ownership is covered
[e] Community, social and personal services are not covered.
[f] Does not cover firms with no extra-EU affiliates.
[g] Only covers extra-EU (27) affiliates.
Note: Given the recent development of this statistical framework, comparability and coverage of data may not always be complete.

Chart SA-1: Exports of commercial services of selected economies by destination, 2008

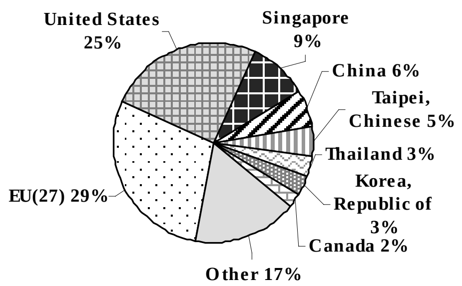
Extra EU (27)



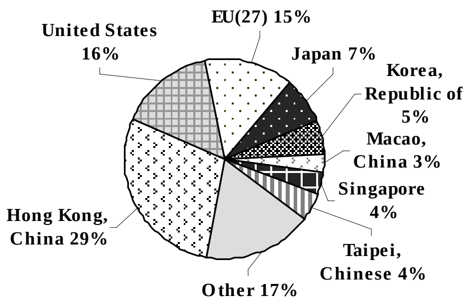
United States



Japan

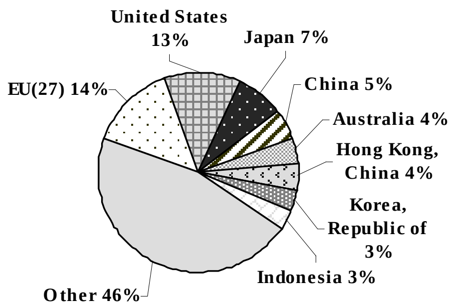


China



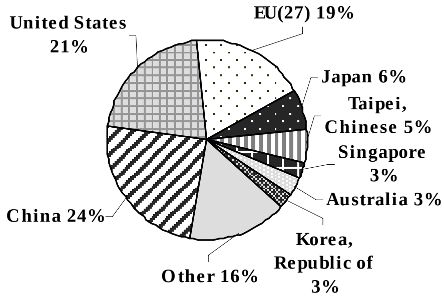
Note: ASEAN countries accounted for 7 per cent of total commercial services exports.

Singapore



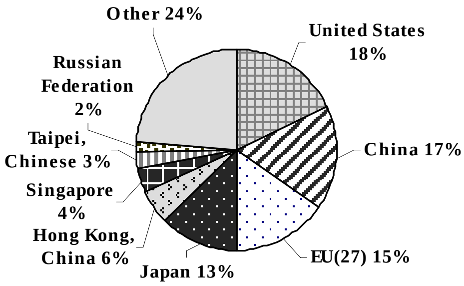
Note: Travel exports and financial services exports related to foreign exchange trading are not allocated geographically. In 2008, they represented 12 per cent of commercial services exports. ASEAN countries accounted for 12 per cent of total commercial services exports.

Hong Kong, China



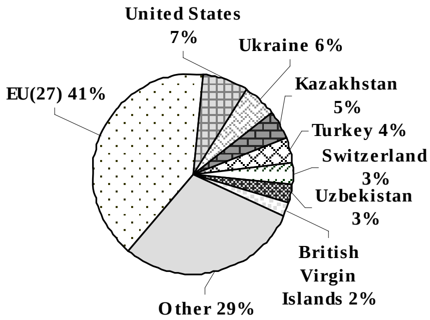
Note: Financial intermediation services are not allocated geographically. In 2008, they represented 2 per cent of exports.

Korea, Republic of



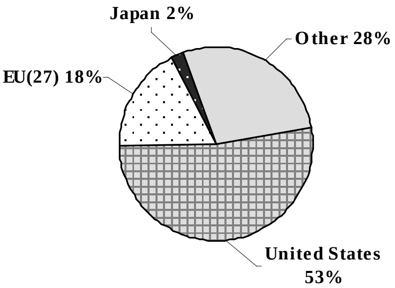
Note: In 2008 exports of commercial services not allocated geographically accounted for 11 per cent of total exports.

Russian Federation



Note: In 2008, exports of commercial services not allocated geographically accounted for 7 per cent of total exports.

Canada



Australia

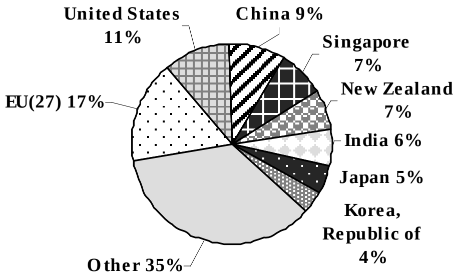
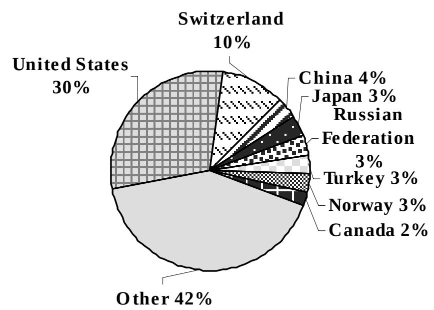
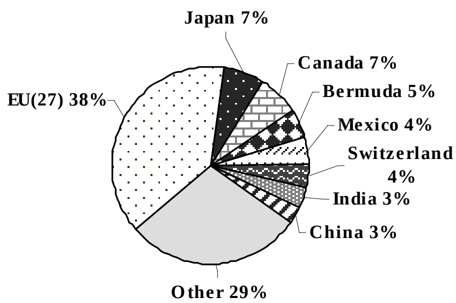


Chart SA-2: Imports of commercial services of selected economies by destination, 2008

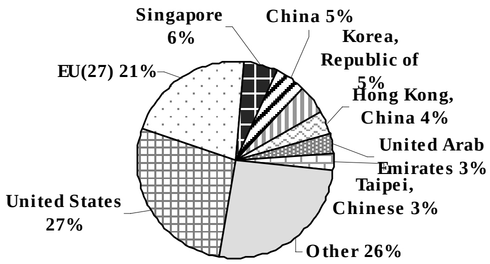
Extra EU (27)



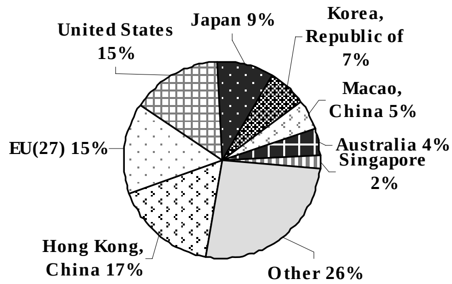
United States



Japan

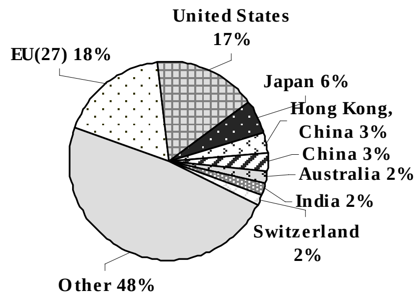


China

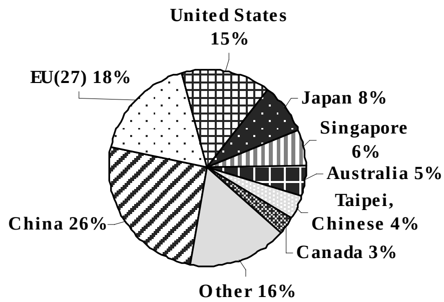


Note: ASEAN countries accounted for 8 per cent of total commercial services imports.

Singapore



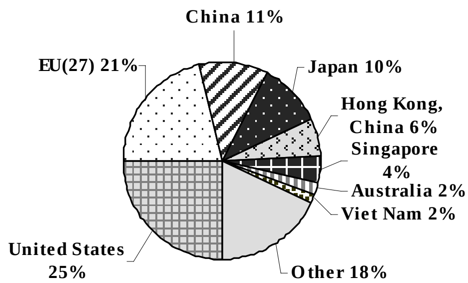
Hong Kong, China



Note: Travel imports, imports of freight transportation services and insurance on goods imports are not allocated geographically. In 2008, they represented 28 per cent of commercial services imports. ASEAN countries accounted for 5 per cent of total commercial services imports.

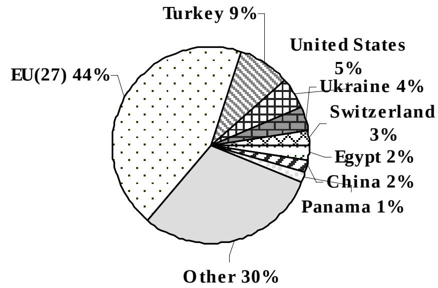
Note: Financial intermediation services are not allocated geographically. In 2008, they represented 1 per cent of imports.

Korea, Republic of



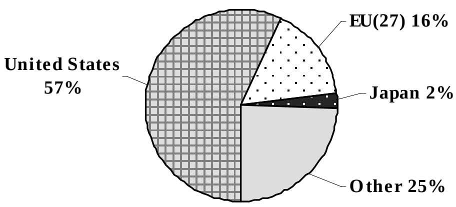
Note: In 2008 imports of commercial services not allocated geographically accounted for 9 per cent of total imports.

Russian Federation



Note: In 2008, imports of commercial services not allocated geographically accounted for 13 per cent of total imports.

Canada



Australia