

EXPORTING OUR SERVICES  
TO THE **WORLD**

**SERVICE EXPORTS VALUED  
\$57 billion**

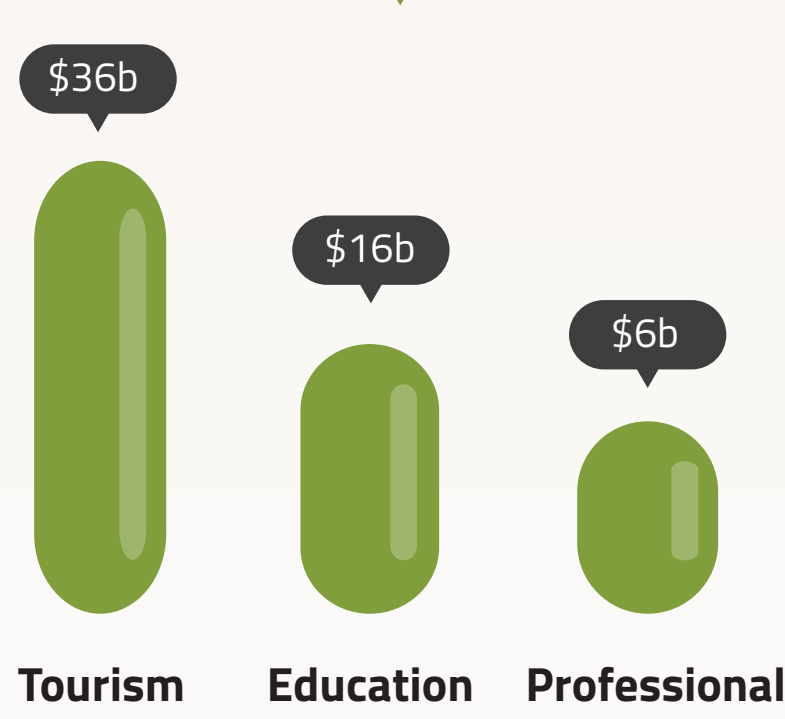
**17% OF TOTAL EXPORTS IN 2013-14**

... and that's not even accounting for services delivered via commercial presence abroad or embodied in goods.

## WE'VE EXAMINED SIX SERVICE SECTORS



**\* TOP SERVICE SECTORS 2013-14**



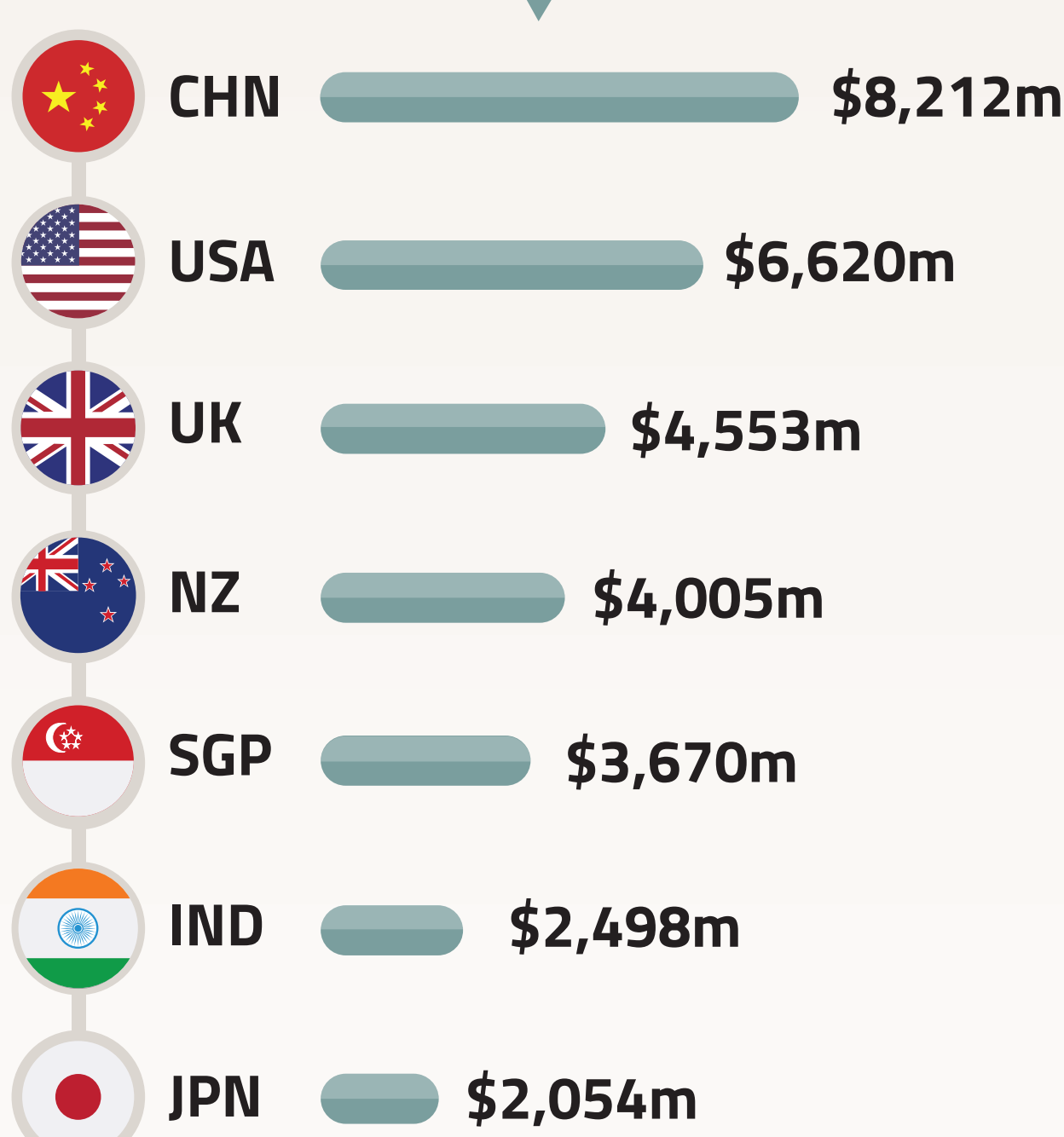
\* excluding commercial presence abroad

WHICH ACCOUNT FOR

**85%**

OF TOTAL VALUE OF SERVICE EXPORTS

### WHO ARE OUR MAJOR MARKETS?



## WHAT ARE SOME OPPORTUNITIES FOR GROWTH?



Global  
value chains



Increased incomes  
- particularly from Asia



Technological  
advances

## BUT, THERE ARE INTERNATIONAL AND DOMESTIC BARRIERS TO GROWING OUR SERVICE EXPORTS

### RESTRICTIONS ABROAD



Setting up a  
commercial presence



Cross-border  
data flows



Licensing  
regulations

### ARRANGEMENTS AT HOME



Tourism and education  
infrastructure



Air  
services



Visa  
processing

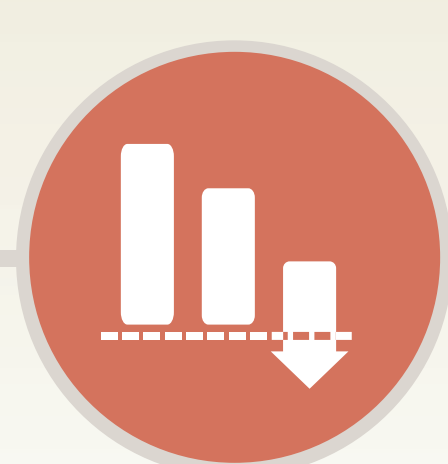
## BARRIERS IMPEDE SERVICE EXPORTS IN VARIOUS WAYS



Raise costs for  
service providers



Restrict supply of  
Australian services



Decrease demand  
for Australian services

## WE HAVE 6 BROAD AREAS OF RECOMMENDATIONS TO ADDRESS BARRIERS



Cutting  
red-tape



Priorities for  
international  
negotiations



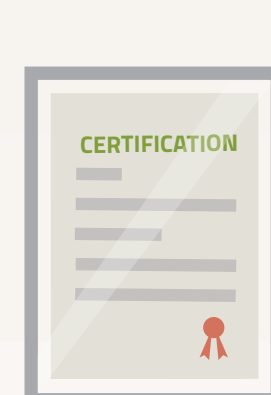
Streamlining  
regulation



Promoting domestic  
competition and productivity



Guiding principles  
for policy



Securing mutual  
recognition agreements

"The **priority** for the Australian Government should be **policy reform** that **promotes competition** and **provides incentives** for domestic firms, including in services sectors, to **innovate** and **lift their productivity**."

*Commissioner Angela MacRae*

