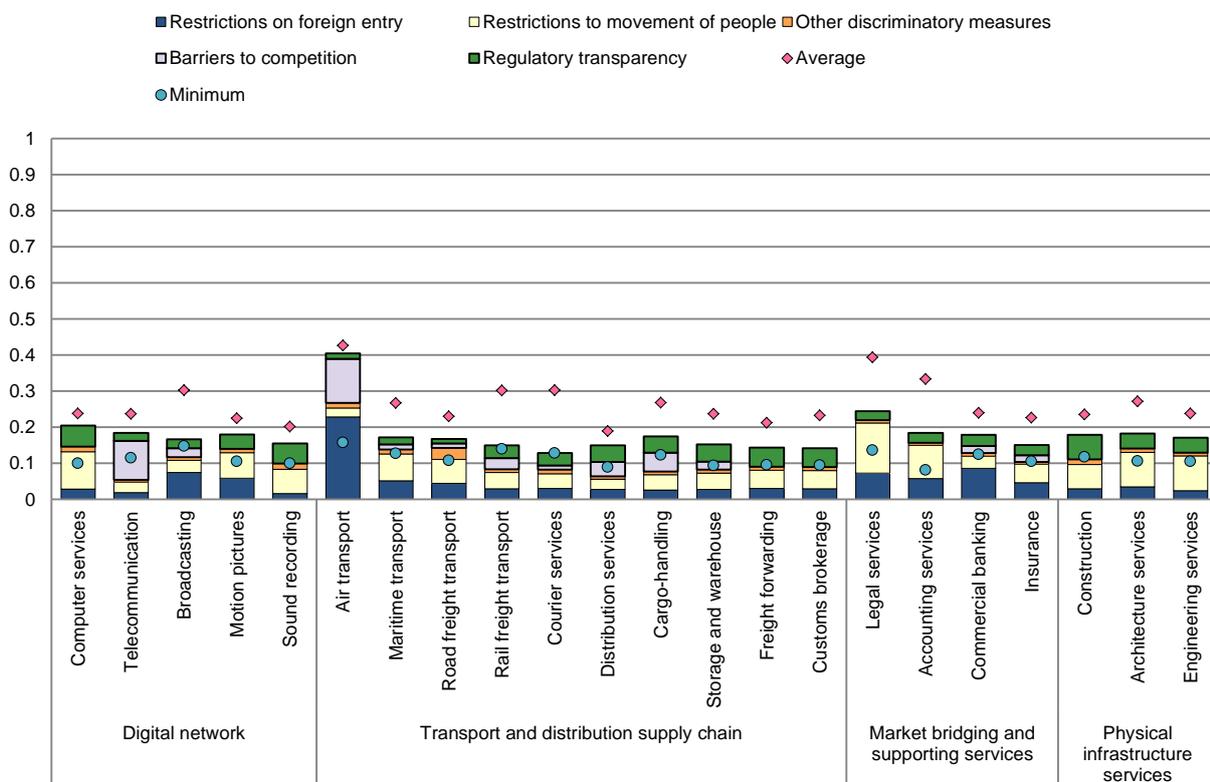


OECD Services Trade Restrictiveness Index (STRI): Netherlands

The Netherlands exported services worth USD 146.3 billion and its services imports amounted to USD 149.5 billion in 2016. The largest services export category was business services (research and development, professional and technical services) while the largest import category was charges for the use of intellectual property.

The Netherlands' score on the STRI index in the 22 sectors covered by the STRI project is shown below, along with the average and the lowest score among the 44 countries included in the STRI database for each sector.

STRI by sector and policy area



Note: The STRI indices take values between zero and one, one being the most restrictive. They are calculated on the basis of the STRI regulatory database which contains information on regulation for the 35 OECD Members, Brazil, China, Colombia, Costa Rica, India, Indonesia, Lithuania, Russia and South Africa. The STRI database records measures on a Most Favoured Nations basis. Preferential trade agreements are not taken into account. Air transport and road freight cover only commercial establishment (with accompanying movement of people).

Horizontal policy measures

The Netherlands scores below the average STRI score in all sectors. A general regulation that contributes to the country's STRI index in all sectors is the economic needs tests for natural persons seeking to provide services in the country on a temporary basis as contractual services suppliers or independent services suppliers. The duration of stay for these categories is limited to 12 months on their first entry permit. In addition to the economic needs test, services suppliers must demonstrate access to housing and must be between 18 and 45 years old. For intra-corporate transferees, wage parity with local employees is also required. The standards for cross-border transfer of personal data are set at the EU level. Transfers to non-EEA economies can only take place when these ensure an adequate level of protection that is substantially similar to that required in the EU or

when private data processors, both senders and receivers, establish various safeguards approved by the data protection authorities.

The sectors with the relatively lowest STRI scores

Courier services, rail freight transport services, and broadcasting services are the three sectors with the lowest score relative to the average STRI across all countries. In courier services, the score is largely driven by horizontal measures. The main sector-specific limitation relates to the preferential treatment that the designated postal operator receives during customs procedures. Similarly in rail transport services, the score reflects mainly general regulations. Under EU law, certain rail transport agreements are exempt from anti-trust regulation. In broadcasting services, sector specific restrictions include quotas on broadcast time, affecting also on-demand streaming services, restrictions on the advertising time, and certain tax reliefs granted to public broadcasters.

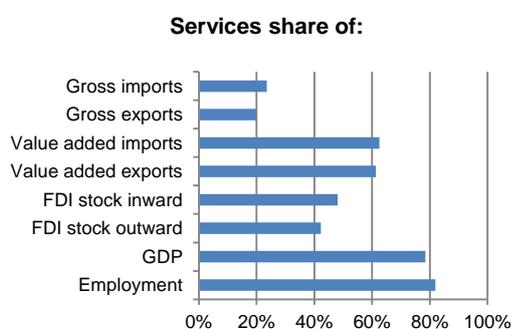
The sectors with the relatively highest STRI scores

Air transport services, computer services and motion pictures services are the three sectors with the highest score relative to the average STRI across all countries. In all three sectors, however, the scores remain below the mean. In the air transport services sector, the Netherlands employs foreign equity restrictions as a result of common European Union (EU) regulation on air services. Pursuant to this regulation, non-EU nationals cannot own more than 49% in Dutch airlines. Lease of foreign aircrafts with crew from outside the EU can be refused on grounds of reciprocity or conditioned on approval granted on the basis of economic needs. An EU-wide exemption of certain airline arrangements from competition law, regulations on airport slot allocation and slot trading further contribute to the score in this sector. In motion pictures and computer services, the score can be explained in a large part by restrictions that apply across the economy. In addition, in motion pictures, the cross-border streaming of media content is subject to limitations.

Recent policy changes

There are no major policy changes that affect the score on the STRI during the period 2014-2017.

Efficient services sectors matter



Services account for 20-24% of gross imports and exports in the Netherlands, but for 61% in value added exports and 63% in value added imports. Services also amount to close to 80% of GDP and employment.

The information and communication technology revolution opens new opportunities for inclusive growth in a services economy like the Netherlands. Innovation and adoption of technology relies on access to knowledge and to the networks, people, goods and services that carry the knowledge around the world. In this context, the Netherlands could benefit from more open markets for services trade through the temporary movement of natural persons.

More information

- » Access all of the country notes, sector notes and interactive STRI tools on the OECD website at <http://oe.cd/stri>
- » Read more about services trade policies and their impacts in this publication: [Services Trade Policies and the Global Economy](#)
- » Contact the OECD Trade and Agriculture Directorate with your questions at stri.contact@oecd.org