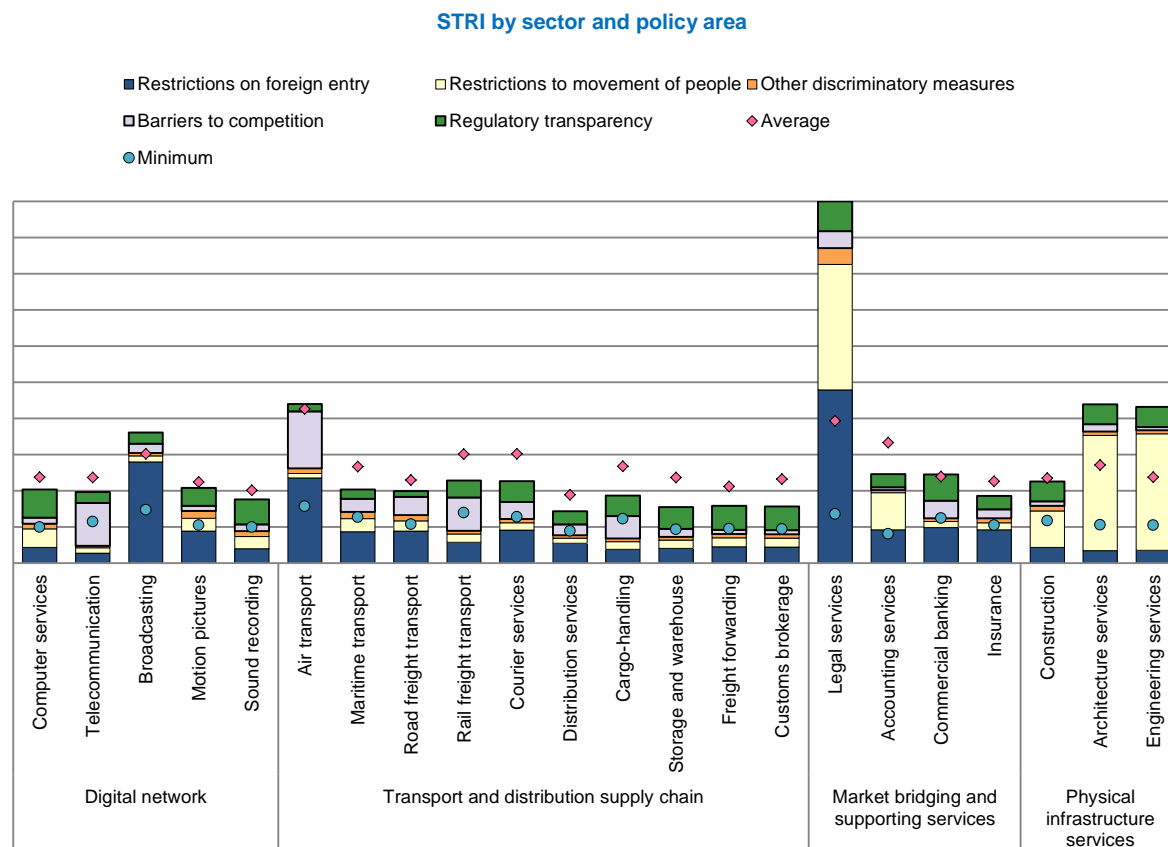


OECD Services Trade Restrictiveness Index (STRI): Poland

Poland exported services worth USD 49 billion and its services import value was USD 34 billion in 2016. Professional and management consulting services are Poland's largest services export and also the largest service imports category.

Poland's 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.



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

Poland has a lower score on the STRI than the average in 16 out of 22 sectors. A general regulation that contributes to the STRI in all sectors is labour market tests for natural persons seeking to provide services in the country on a temporary basis as intra-corporate transferees, contractual services suppliers and independent providers. A minimum amount of capital must be deposited in a bank or with a notary in order to register a limited liability company. Acquisition of land or real estate by foreigners is subject to authorisation. Rights under the public procurement law are limited to partners in regional trade agreements and members of the WTO's Government Procurement Agreement. The standards for the 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. Procedures to obtain business visas and register a company are all significantly more numerous, costly or longer than best practice.

The sectors with the relatively lowest STRI scores

Logistics storage and warehouse, customs brokerage and cargo-handling services are the three sectors with the lowest score relative to the average STRI across all countries. In all three logistics services sectors, the score largely reflects general restrictions contributing to all sectors. Although air crew and seamen are exempted from visa requirements in Poland, there is no such scheme for truck drivers. In addition, commercial presence is required to operate customs brokerage and freight transport agency services.

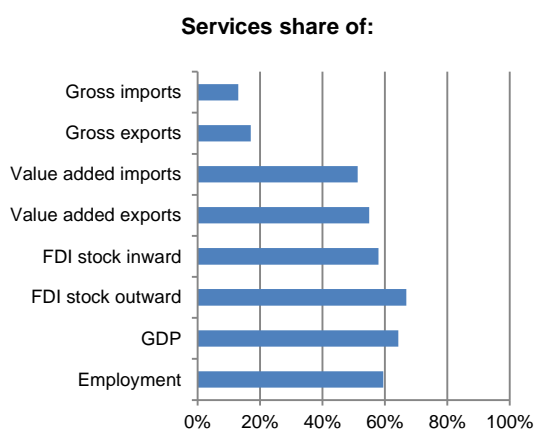
The sectors with the relatively highest STRI scores

Legal, architecture and engineering services are the three sectors with the highest score relative to the average STRI across all countries. Restrictions on the movement of people have a significant impact on these three sectors. In Poland, the practice of both domestic law and international law is subject to licensing. The shares of law firms must be owned by licensed lawyers. Although foreign qualifications are recognized on a reciprocal basis, foreign lawyers outside the scope of reciprocal treatment are required to completely requalify to practice in Poland. There is no temporary licensing system in place. These restrictions prevent market entry and competition by lawyers from countries outside the European Economic Area (EEA). Architects and engineers are regulated professions in Poland. Polish or EEA nationality is required to obtain a licence to practice both professions. There is no temporary licensing scheme in place. Recognition of foreign qualifications to obtain a license is limited to EEA member countries. Foreign suppliers can, however, enter the market by investing in architecture and engineering services firms and by hiring licensed persons.

Recent policy changes

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

Efficient services sectors matter



Services account for 17% of Poland's gross exports, but 55% of value-added exports, indicating that Poland's exports of goods rely intensively on services inputs. The services share of inward investment is around 60%. Services account for around 60% of employment, which implies that earnings and aggregate demand depends crucially on productivity in the services sector.

The information and communication technology revolution opens new opportunities for inclusive growth in Poland. 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, Poland could benefit from more open markets for services trade through the temporary movement of natural persons in some sectors.

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