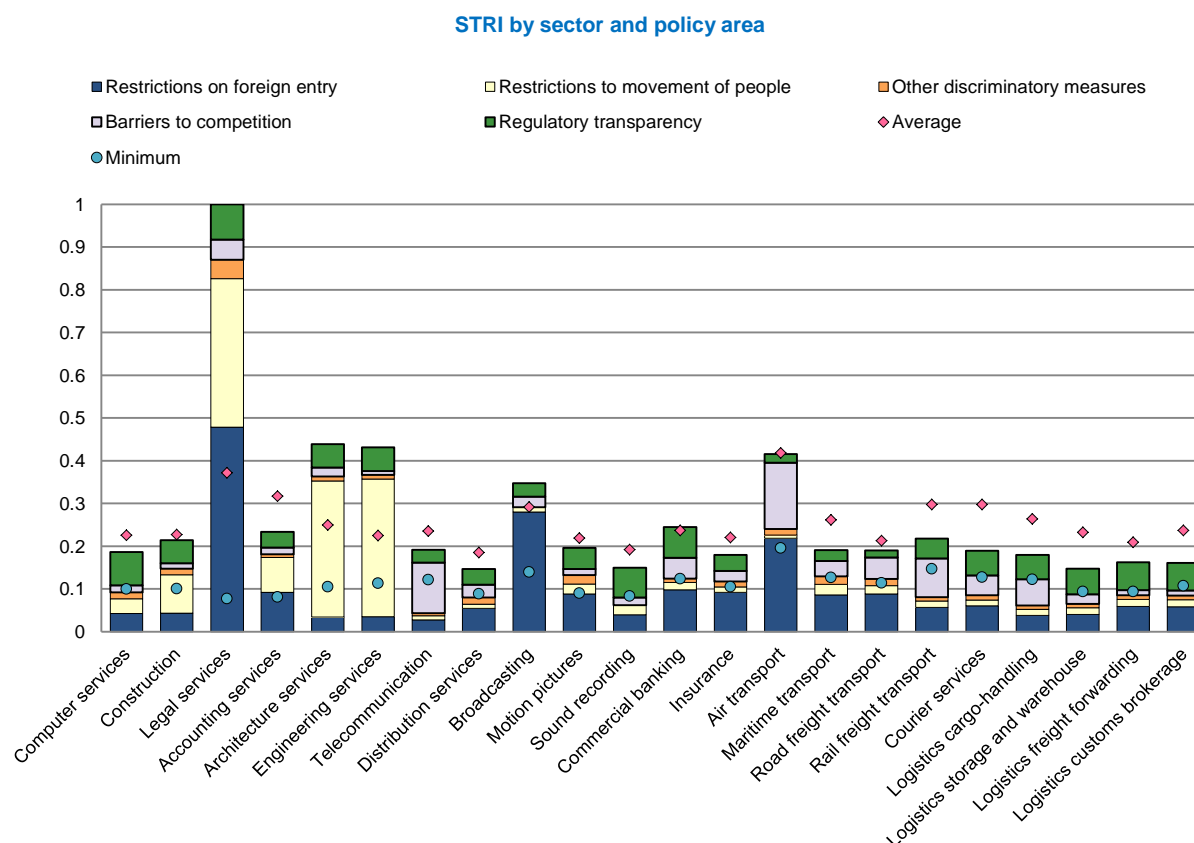


OECD Services Trade Restrictiveness Index (STRI): Poland

Poland exported services worth USD 43 billion and its services import value was USD 33 billion in 2015. 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 17 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 contractual services suppliers or independent providers. Minimum capital requirements to register a company also contribute to the score horizontally. Acquisition of land or real estate by foreigners is subject to authorisation. Rights under the public procurement act 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 to 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, courier and logistics customs brokerage are the three sectors with the lowest scores relative to the average in Poland. A majority of board members in an auditing firm and its managers must be licensed auditors. In logistics storage and warehouse services and logistics customs brokerage, 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 services. Courier services are largely subject to horizontal measures. In addition the government-owned designated postal operator receives preferential subsidies.

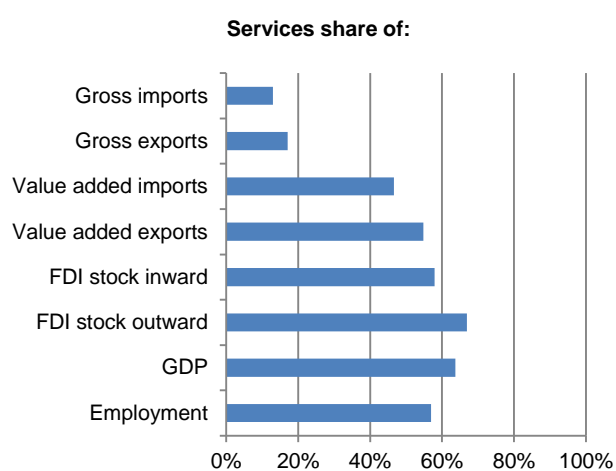
The sectors with the relatively highest STRI scores

Legal, architecture and engineering services are the three sectors with the highest score relative to the average in Poland. Restrictions relating to 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. Poland has the most restrictive regime in this sector. It requires that equities of the law firms must be owned by members of the bar association. Although foreign qualifications are recognized on a reciprocal basis, foreign lawyers from countries not concluding such 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. Architects and engineers are regulated professions in Poland. Polish or EU 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 European Economic Area 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 of 2015-2016.

Efficient services sectors matter



Services account for 17% of Poland's gross export, but 55% of value-added exports, indicating that Poland's exports of goods rely intensively on services inputs. Cost effective state of the art services are therefore of utmost importance for the competitiveness of the Polish industrial sector. 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. Poland could further improve efficiency of its economy by prioritising reforms that enhance competition in services market, particularly by focusing in professional services that are essential inputs to other services.

More information

- » Access all of the country notes, sector notes and interactive STRI tools on the OECD website at <http://oe.cd/stri>
- » Contact the OECD Trade and Agriculture Directorate with your questions at stri.contact@oecd.org