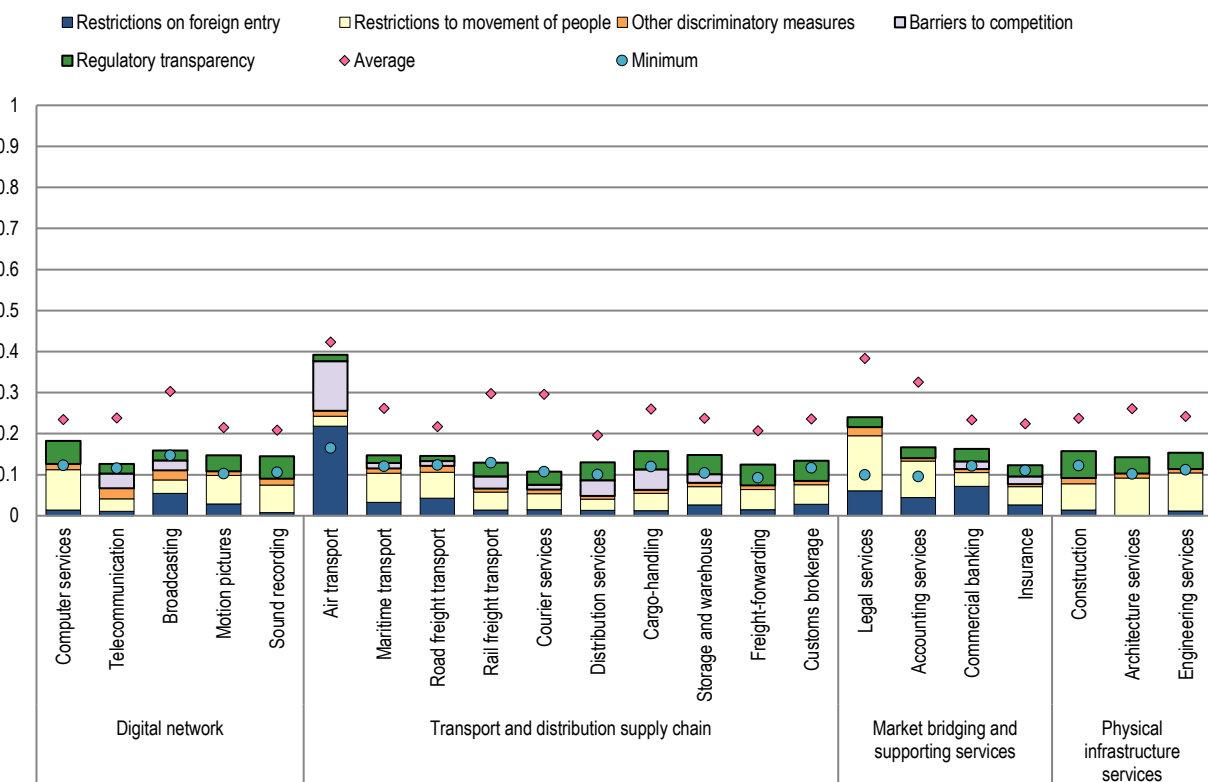


OECD Services Trade Restrictiveness Index (STRI): Netherlands

The Netherlands exported services worth USD 217 billion and its services imports amounted to USD 211 billion in 2017. 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 45 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 36 OECD Members, Brazil, China, Colombia, Costa Rica, India, Indonesia, Malaysia, 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 has a lower score on the STRI than the average 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 take place when these ensure an adequate level of data protection or, in the absence of this, appropriate safeguards (e.g., binding corporate rules or standard data protection clauses) are in place.

The sectors with the relatively lowest STRI scores

Courier services, rail freight transport services, and accounting 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. The scores for accounting services comprise also auditing services, both of which are regulated professions in the Netherlands. While the regulatory environment is relatively open towards non-EU professionals, economy-wide restrictions on the temporary movement of persons and the absence of a temporary licensing regime remain the main contributors to the index in this sector.

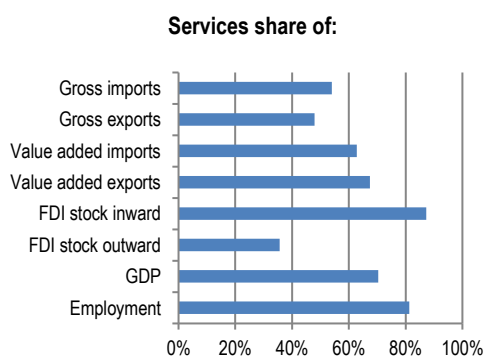
The sectors with the relatively highest STRI scores

Air transport services, computer services and commercial banking 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 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. The score in computer services is due to economy-wide regulations affecting all sectors. In commercial banking services, in addition to horizontal measures, foreign entities are required to establish a commercial presence in the Netherlands, with certain managers being residents there, before they can provide services. The Government also retains control of ABN AMRO Group N.V, a major bank in the sector.

Recent policy changes

In October 2018, a new law was introduced to strengthen the protection on trade secrets. The new EU General Data Protection Regulation (Regulation 2016/679) entered into force on 25 May 2018 providing a comprehensive update on the EU data protection regime. The divestment of ASR Nederland N.V., a previously state owned insurance provider, was completed in September 2017. Also in 2017, the Government's share in ABN AMRO Group N.V. was reduced to 56% (from 63%). As of 2016, revised conditions, including on economic needs, apply for authorisations for the operation of storage facilities for the customs warehousing of goods pursuant to Regulation (EU) No 952/2013.

Efficient services sectors matter



Services account for around 50% of gross imports and exports in the Netherlands, but for 67% in value added exports and 63% in value added imports. Services also amount to around 70% of GDP and 81 % of 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