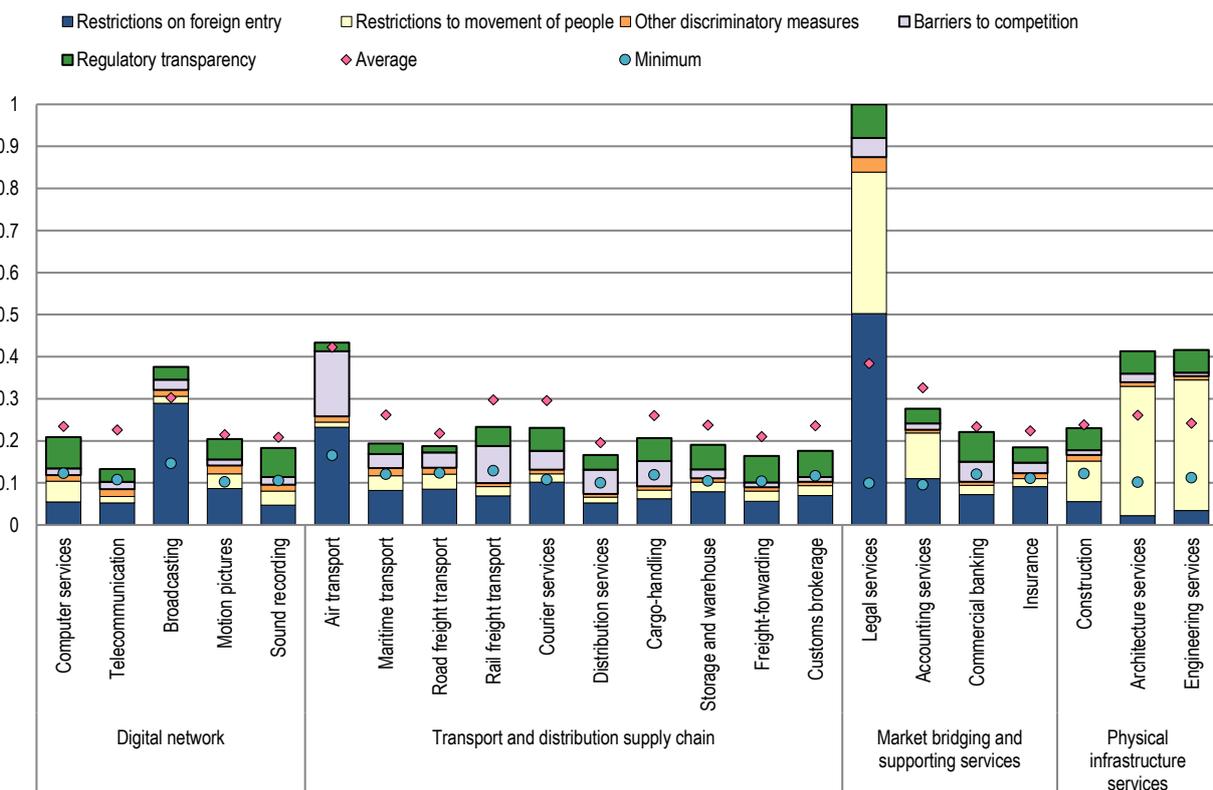


## OECD Services Trade Restrictiveness Index (STRI): Poland

Poland exported services worth USD 59 billion and its services import value was USD 38 billion in 2017. 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 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

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 intra-corporate transferees, contractual services suppliers and independent services suppliers. 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 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. 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

Telecommunications, maritime transport and logistics customs brokerage are the three sectors with the lowest score relative to the average in Poland. In telecommunications and customs brokerage sectors, the score largely reflects horizontal restrictions contributing to all sectors. In addition, commercial presence is required to provide customs brokerage services. In the maritime transport sector, cabotage operations are limited to vessels registered in the EU but non-EU vessels may also be allowed to operate in certain cases. The registration of vessels in the national ship registry is subject to majority local ownership. Moreover, certain shipping agreements are partially exempt from national competition laws and the state controls a major firm in the sector.

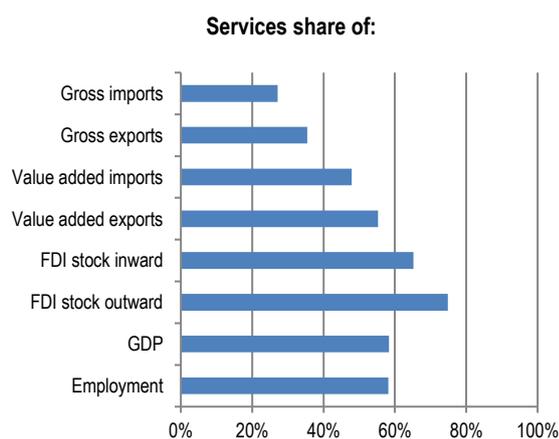
### The sectors with the relatively highest STRI scores

Legal services, engineering services and architecture services, are the three sectors with the highest score relative to the average in Poland. 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

In 2018, Poland introduced a new Act Governing the Business Operations of Foreign Enterprises and other Foreign Persons on the Territory of the Republic of Poland. The Act improves the regulatory environment for entrepreneurs by uniting previously dispersed provisions in one law and eliminating legal uncertainties. 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.

### Efficient services sectors matter



Services account for 35% 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 65%. Services account for almost 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](mailto:stri.contact@oecd.org)