



## Courier Services 2022

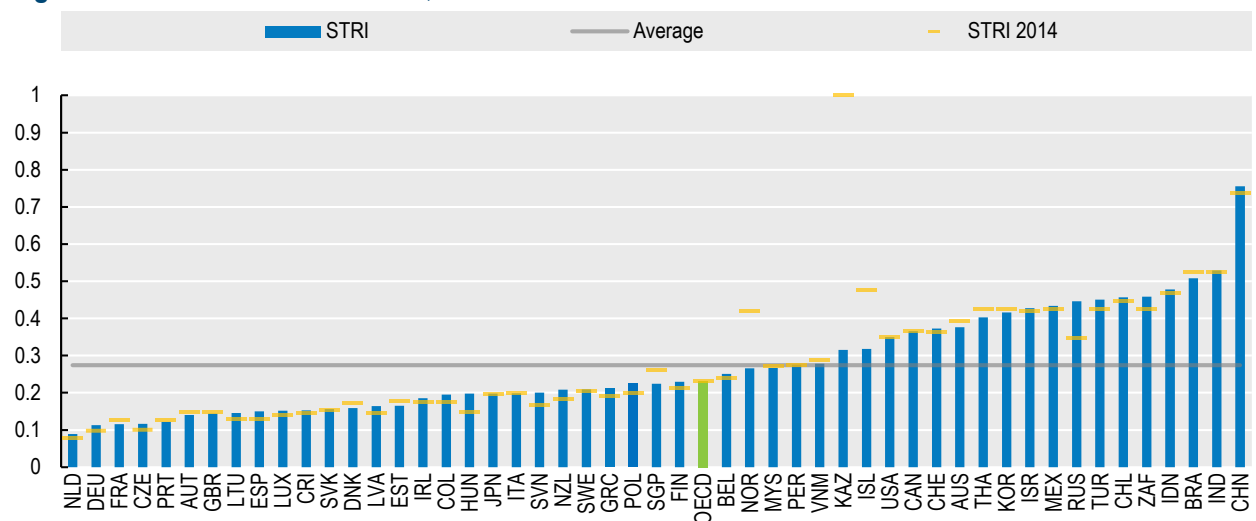
### Key findings

- The average 2022 STRI in the courier services sector is 0.28 out of a maximum of 1 (most trade restricted), indicating a relatively high overall level of restrictiveness. However, individual country scores diverge considerably, ranging between 0.09 and 0.76.
- The best performing countries in the sector are the Netherlands, Germany and France. Most reforms in 2022 was recorded Japan.
- Restrictions to foreign entry are the main drivers of trade restrictiveness in the sector, with contributions to the total index values ranging between 48% in OECD economies and 57% in non-OECD economies.
- OECD estimates suggest that halving the distance to best practice in this sector is associated with a reduction in the costs of cross-border trade in courier services between 7% and 14% for the average country included in the STRI database

The sector is defined under ISIC Rev 4 code 53 as postal and courier activities. While digitization has reduced traditional letter mails, e-commerce growth increases the demand for parcels and express deliveries. As the supply chains connect more deeply, timely, precise, and reliable delivery services become critical.

The 2022 STRIs in the courier services sector range between 0.09 and 0.73, with a sample average of 0.28 (Figure 1). There are 32 countries below and 18 countries above the average. The best performing countries in the sector are the Netherlands, Germany and France.

Figure 1. STRI in courier services, 2022

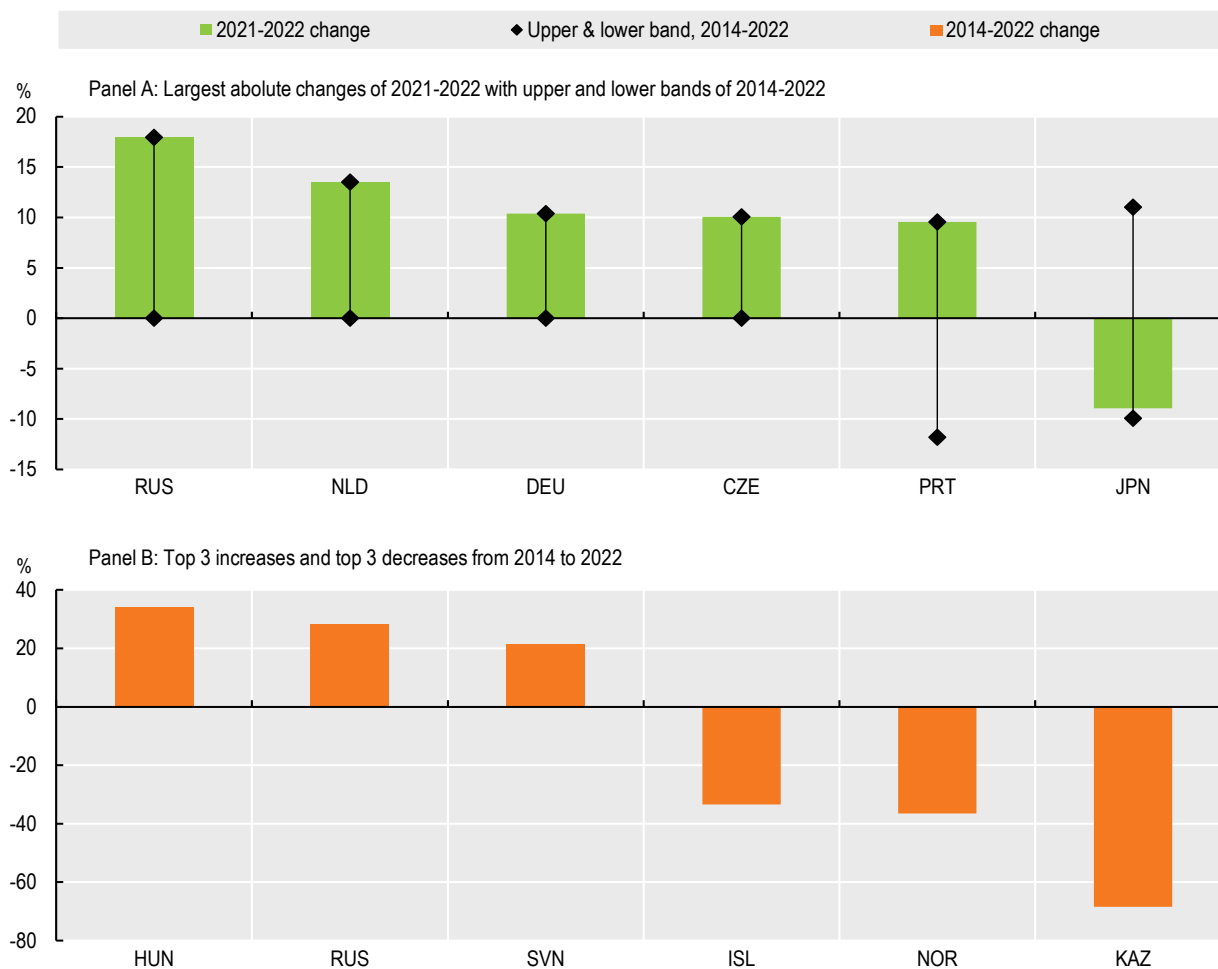


Note: The STRI indices take values between zero and one, one being the most restrictive. The indices are based on laws and regulations in force on 31 October 2022. The STRI regulatory database covers the 38 OECD countries, Brazil, China, India, Indonesia, Kazakhstan, Malaysia, Peru, Russian Federation, Singapore, South Africa, Thailand, and Viet Nam. The statistical data for Israel are supplied by and

under the responsibility of the relevant Israeli authorities. The use of such data by the OECD is without prejudice to the status of the Golan Heights, East Jerusalem and Israeli settlements in the West Bank under the terms of international law.  
Source: OECD (2022). STRI database.

Several countries introduced regulatory changes affecting the STRIs in 2022 and more so since 2014 (Figure 2). In 2022, the STRIs in this sector saw the biggest changes in the Russian Federation (18%), the Netherlands (14%), Germany (10%), the Czech Republic (10%), Portugal (10%), and Japan (-9%). Since 2014, on the one hand, we have observed countries that have had the strongest restrictive trends such as Hungary (34%), the Russian Federation (28%) and Slovenia (21%). On the other hand, we have strong liberalising trends in Iceland (-33%), Norway (-36%), and Kazakhstan (-68%).

**Figure 2. Change since 2014 and change in the last year, by country**

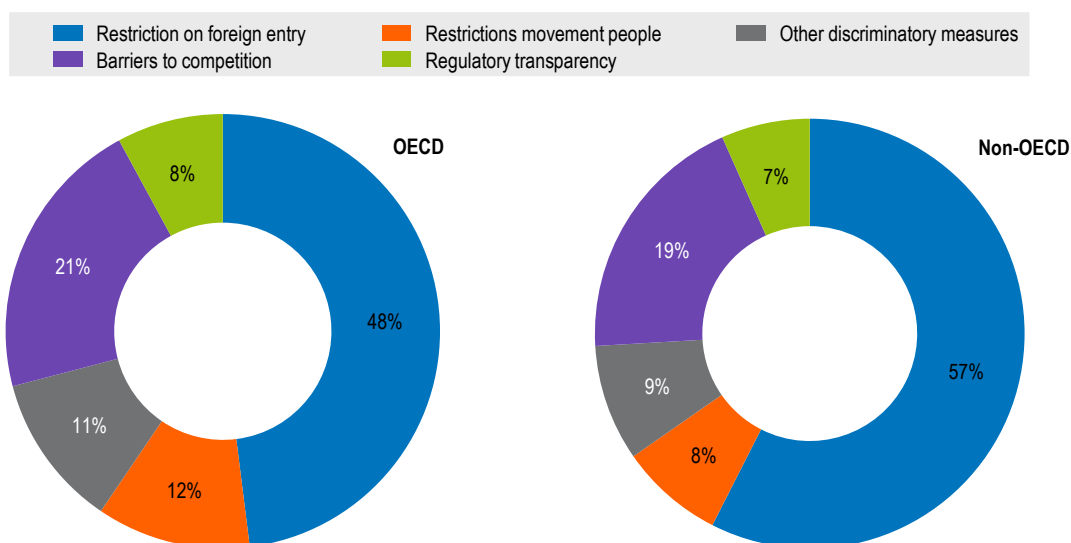


Note: Selection criteria for Panel A was based on largest absolute changes since 2020. Panel B selection is the 3 largest increases, and the 3 largest decreases in the STRI since 2014.

Source: OECD (2022). STRI database.

The measures in the STRI database are organised under five policy areas (Figure 3). Restrictions on foreign entry include barriers related to establishing and operating companies such as foreign equity limits or requirements on board of directors and cross-border data flows. Restrictions on the movement of people cover barriers that affect the temporary entry of foreign services providers through quotas, labour market tests and short durations of stay. Other discriminatory measures include discrimination of foreign services suppliers as far as taxes, subsidies and public procurement are concerned. Barriers to competition include information on anti-trust policy, government ownership of major firms and the extent to which government-owned enterprises are exempt from competition laws. Regulatory transparency includes information on consultations and dissemination prior to laws and regulations entering into force. It also records information on obtaining a license or a visa. In this sector, barriers related to restrictions on foreign entry are most prominent and amount to 48% in OECD economies and 57% in non-OECD economies.

**Figure 3. STRI for courier services with policies areas in OECD and non-OECD economies, 2022**



Source: OECD (2022). STRI database.

Table 1 lists the most relevant restrictions identified in each policy area.

**Table 1. Top 5 most relevant measures by policy area, 2022**

Policy area	Measure	Countries having a restriction
Restrictions on foreign entry	Acquisition and use of land and real estate by foreigners is restricted	35
	Memo: Licence/authorisation is required to enter the market	33
	Screening exists without exclusion of economic interests	22
	Board of directors: at least one must be resident	19
	Memo: Monopoly on letters	13
Restrictions to movement of people	Limitation on duration of stay for contractual services suppliers	37
	Labour market tests: intra-corporate transferees	37
	Labour market tests: contractual services suppliers	37
	Memo: Licence or authorisation is required to practice	6
	Laws or regulations establish a process for recognising qualifications gained abroad	2
Other discriminatory measures	Public procurement: Procurement regulation explicitly prohibits discrimination of foreign suppliers	42
	Access to the procurement market is conditional on reciprocity	29
	Public procurement: The procurement process affects the conditions of competition in favour of local firms	24
	Public procurement: Explicit preferences for local suppliers	21
	Memo: The procurement process below the value thresholds affects the conditions of competition in favour of local firms	19
Barriers to competition	Memo: there is a designated postal operator to provide universal postal services	49
	National, state or provincial government control at least one major firm in the sector	47
	Minimum capital requirements	33
	Memo: there is at least one dominant provider in courier services market (other than universal postal services)	30
	The designated postal operator obtains preferential tax or subsidy treatment	2
Regulatory transparency	Range of visa processing time	28
	Memo: fees required to obtain a licence/authorisation	27
	A de minimis regime is in place: Import duties (USD)	15
	Restrictions related to the duration and renewal of licences	9

Note: The count for “memo” type of measures, which are not scored in the STRI, indicate the number of positive answers recorded for that measure across the 50 countries covered. Top most relevant measures are selected on the basis of the following criteria: (1) most restricted horizontal measures (i.e. same answer across sectors), (2) most restricted sector-specific measures, (3) key measures or (4) memos affecting the score of other measures through hierarchy rules.

Source: OECD STRI database (2022).

**More information**

- » Access all country notes, sector notes, and interactive STRI tools at <http://oe.cd/stri>.
- » Read more about services trade policies and their impacts in [Services Trade Policies and the Global Economy](#).
- » Calculations based on Benz, S. and A. Jaax (2020), "The costs of regulatory barriers to trade in services: New estimates of ad valorem tariff equivalents", OECD Trade Policy Papers, No. 238, OECD Publishing, Paris, <https://doi.org/10.1787/bae97f98-en>.
- » Contact the OECD Trade and Agriculture Directorate with your questions at [stri.contact@oecd.org](mailto:stri.contact@oecd.org).