



## Maritime Freight Transport Services 2022

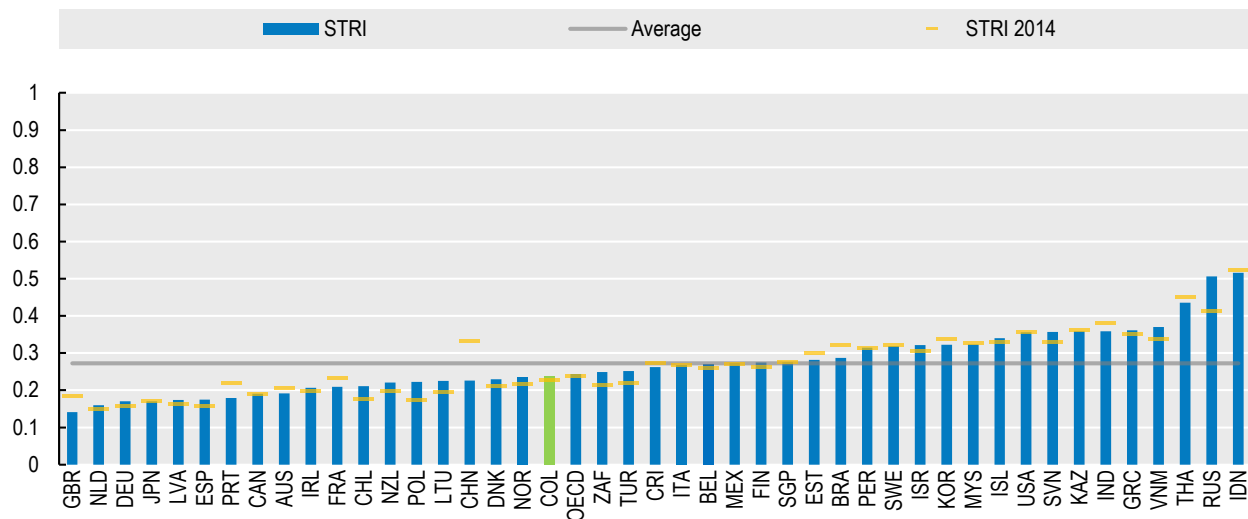
### Key findings

- The average 2022 STRI in the maritime transport sector is 0.27 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 0.14 and 0.52.
- The best performing countries in the sector are the United Kingdom, the Netherlands and Germany. Most regulatory reforms in 2022 were recorded in Japan and Türkiye.
- Restriction on foreign entry are the main drivers of trade restrictiveness in the sector, with contributions to the total index values of 47% in OECD economies and 58% 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 maritime services between 5% and 13% for the average country included in the STRI database.

Maritime freight transport services cover sea shipping and related port activities (ISIC Rev 4, code 5012). Maritime transport services, as covered by the STRI, refer to seaborne transport of freight and port and auxiliary services necessary to enable maritime transport, such as the access to essential facilities at ports, the provision and use of port services, including marine services, maintenance and repairs services and other activities linked to the ability to organize the ship transport (maritime-related documentation, cargo-handling, etc.). Maritime passenger transport, transport on internal waterways and services necessary to support maritime transport movements (pilotage, towing, tugging, and cargo-handling) are excluded.

The 2022 STRIs in the maritime transport sector range between 0.14 and 0.52, with a sample average of 0.27 (Figure 1). There are 25 countries below and 19 countries above the average. The best performing countries in the sector are the United Kingdom, the Netherlands and Germany.

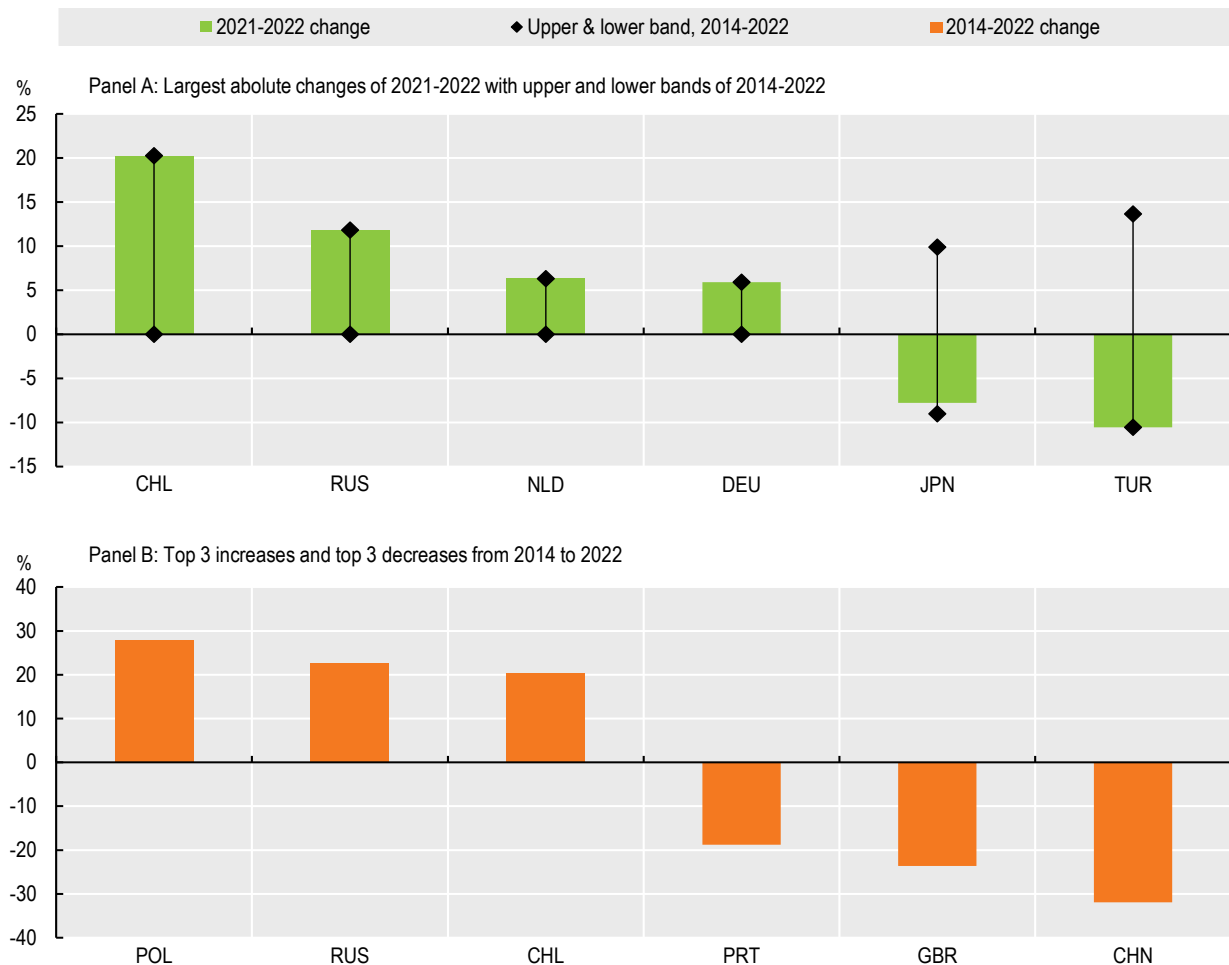
Figure 1. STRI in maritime transport services, 2022



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. Land-locked countries are not included in the STRI country coverage of this sector. 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 Chile (20%), the Russian Federation (12%), the Netherlands (6%), Germany (6%), Japan (-8%), and Türkiye (-11%). Since 2014, on the one hand, we have observed countries that have had the strongest restrictive trends such as Poland (28%), the Russian Federation (23%) and Chile (20%). On the other hand, we have strong liberalising trends in Portugal (-19%), the United Kingdom (-24%), and China (-32%).

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

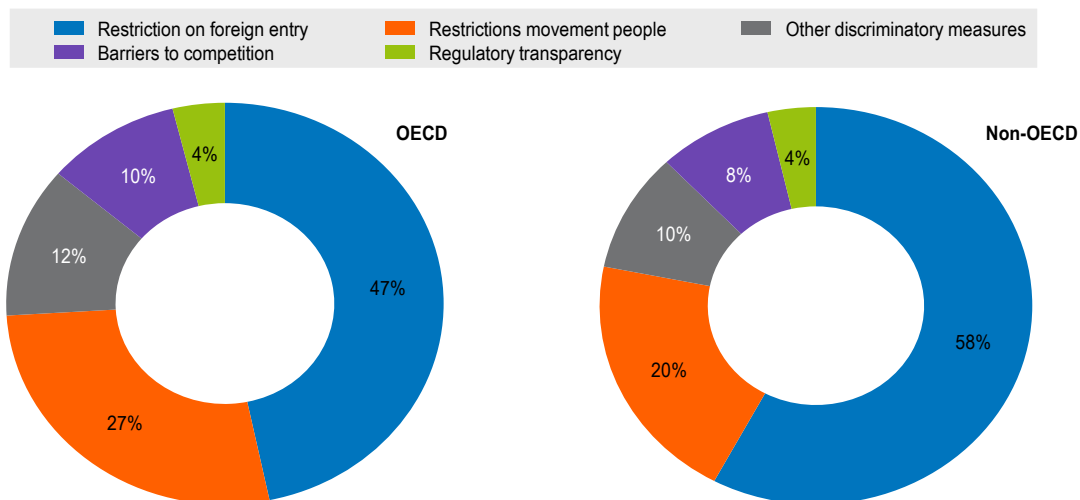


Note: Selection criteria for Panel A was based on largest absolute changes since 2020. Panel B selection is the 3 largest increases, and the 3 largest decreases in the STRI since 2014.  
Source: OECD (2022). STRI database.

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 47% in OECD economies and 58% in non-OECD economies.

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



Source: OECD (2022). STRI database.

There are no countries that are fully closed to trade in this sector.

Table 1 lists the most common restrictions identified for each policy area. Under restrictions on foreign entry, common impediments relate to restrictions on foreign registration of vessels under national flags, exclusion of foreign flagged ships from cabotage (including partial exclusion), screening of foreign investments, and residency requirements for board of directors. Other common restrictions include statutory monopolies on port services and limits to the proportion of shares that can be acquired by foreign investors in publicly controlled firms.

Under restrictions to the movement of people, the main measures that contribute to the score are short stay permits for initial stay, labour market tests and lack of processes to recognise qualifications obtained abroad.

Other characteristic restrictions in this sector include obligations to use local maritime port agents as well as exempting certain types of shipping agreements from national competition laws. Finally, under barriers related to regulatory transparency, cumbersome visa conditions for crew members as well as non-transparent authorization fees are the most common challenges in this sector.

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

Policy area	Measure	Countries having a restriction <sup>2</sup>
Restrictions on foreign entry	Restrictions to own and/or register vessels under national flags	41
	Foreign-flagged ships are partially excluded from cabotage	35
	Screening exists without exclusion of economic interests	29
	Board of directors: at least one must be resident	19
Restrictions to movement of people	Memo: Licence or authorisation is required to practice	42
	Limitation on duration of stay for contractual services suppliers (months)	33
	Labour market tests or similar economic considerations: intra-corporate transferees	33
	Labour market tests or similar economic considerations: contractual services suppliers	31
	Laws or regulations establish a process for recognising qualifications gained abroad	11
Other discriminatory measures	Foreign suppliers are treated less favourably regarding taxes and eligibility to subsidies	25
	Access to the procurement market is conditional on reciprocity	23
	Public procurement: The procurement process affects the conditions of competition in favour of local firms	22
	Discriminatory port tariffs and other port-related fees	7
Barriers to competition	Obligation to use a local maritime port agent	29
	Certain types of shipping agreements are partially exempt from national competition laws	28
	Minimum capital requirements	26
	National, state or provincial government control at least one major firm in the sector	18
	Publicly-controlled firms are exempted from the application of the general competition law	1
Regulatory transparency	Memo: Licensing and authorization fees are transparent	27
	Range of visa processing time (days)	22
	Number of documents needed to obtain a business visa	21
	There is an adequate public comment procedure open to interested persons, including foreign suppliers	8

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).

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