



## Courier Services 2023

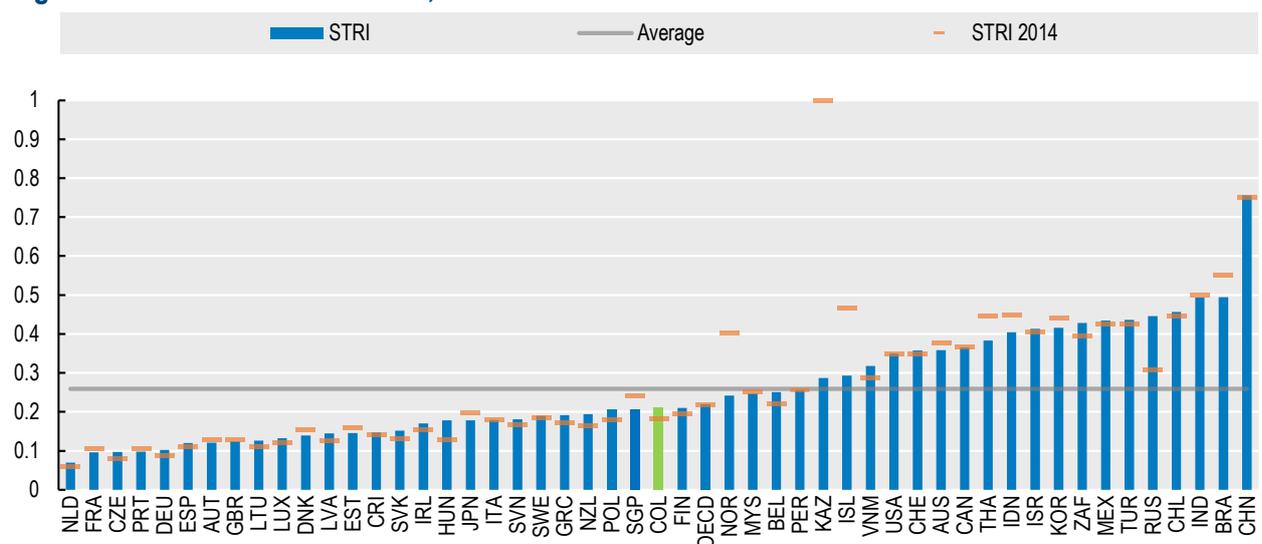
### Key findings

- The average 2023 STRI in the courier services sector is 0.26 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 0.07 and 0.76.
- The best performing countries in the sector are the Netherlands, France, and Czechia. Most reforms in 2023 were recorded in Spain, Portugal, and Korea.
- In this sector, barriers related to restrictions on foreign entry are the most prominent, amounting to 44% of all restrictions in OECD economies and 56% 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 15% for the average country included in the STRI database.

The courier services 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 2023 STRIs in the courier services sector range between 0.07 and 0.74, with a sample average of 0.26 (Figure 1). There are 31 countries below and 19 countries above the average. The best performing countries in the sector are the Netherlands, France, and Czechia.

Figure 1. STRI in courier services, 2023



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 2023. 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 (2023). STRI database.

Several countries introduced regulatory changes affecting the STRIs in 2023 and more so since 2014 (Figure 2). In 2023, the STRIs in this sector saw the biggest changes in the Slovak Republic (15%), Viet Nam (14%), Belgium (9%), Korea (-3%), Portugal (-5%), and Spain (-8%). Since 2014, on the one hand, countries that have had the strongest restrictive trends in the courier services sector include the Russian Federation (45%), Hungary (39%), and Czechia (19%). On the other hand, strong liberalisation has taken place in Iceland (-37%), Norway (-40%), and Kazakhstan (-71%).

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



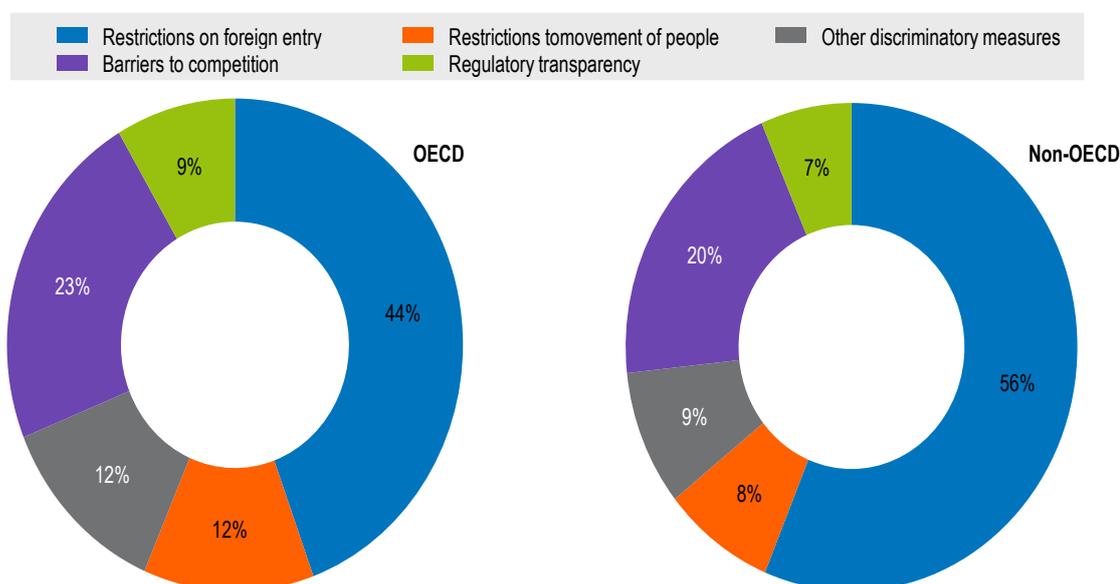
Note: Selection criteria for Panel A were based on largest absolute changes since 2022. Panel B selection is the 3 largest increases, and the 3 largest decreases in the STRI since 2014.

Source: OECD (2023). 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 before laws and regulations enter into force. It also records information on obtaining a license or a visa. In the courier services sector,

barriers related to restrictions on foreign entry are the most prominent, amounting to 44% of all restrictions in OECD economies and 56% in non-OECD economies.

**Figure 3. STRI for courier services by policy area in OECD and non-OECD economies, 2023**



Source: OECD (2023). STRI database.

There are no countries that are fully closed to trade in the courier services sector.

Table 1 lists the most relevant restrictions identified in each policy area. Under restrictions on foreign entry, common impediments to trade include restrictions on the acquisition and use of land and real estate, screening requirements for foreign investments, and limits to the proportion of shares that can be acquired by foreign investors in publicly-controlled firms. 26 out of the 50 countries covered have foreign investment screening mechanisms that do not explicitly rule out the consideration of economic motives or interests. 13 countries maintain a statutory monopoly on letters.

Restrictions to the movement of people are relatively common across the board. 36 countries have a relatively short duration of initial work or residency permits for contractual services suppliers, and the entry of contractual services suppliers and intra-corporate transferees is conditional on labour market testing or similar economic considerations in 37 and 36 countries, respectively. Under other discriminatory measures, barriers related to accessing public procurement markets for foreign tenderers remain the most common challenge.

Barriers to competition remain relatively significant in the courier services sector. Nearly all countries in the sample have a government-controlled major firm in the sector. At the same time, in 25 countries, the government can overrule the decision of the postal/courier regulator. In 22 of the 49 countries having a designated postal operator to provide universal postal services, the designated operator obtains preferential treatment with regard to taxes or subsidies, which puts other providers at a competitive disadvantage.

Under barriers related to regulatory transparency, a relatively long processing time of business visa applications contributes to the index for many countries. In addition, nine countries maintain restrictions related to the duration and renewal of licences.

**Table 1. Top 5 most relevant measures by policy area, 2023**

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	26
	There are limits to the proportion of shares that can be acquired by foreign investors in publicly-controlled firms	25
	Memo: Monopoly on letters	13
Restrictions to movement of people	Labour market tests or similar economic considerations: contractual services suppliers	37
	Labour market tests or similar economic considerations: intra-corporate transferees	36
	Limitation on duration of stay for contractual services suppliers	36
	Other restrictions to movement of people	7
	Memo: Licence or authorisation is required to practice	5
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	46
	Memo: there is at least one dominant provider in courier services market (other than universal postal services)	30
	The government can overrule the decision of the regulator	25
	The designated postal operator obtains preferential tax or subsidy treatment	22
Regulatory transparency	Range of visa processing time	31
	Memo: The licensing authority acts independently from the government or private sector	31
	Memo: fees required to obtain a licence/authorisation	26
	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, indicates the number of positive answers recorded for that measure across the 50 countries covered. The topmost 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 (2023).

## More information

- » Access all country notes, sector notes, and interactive STRI tools at <http://oe.cd/stri>
- » Read more about [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)