

SUMMARY AND CONCLUSIONS

We conducted a study from September 2003 to October 2004 on the non-tolerated sale of cannabis in the Netherlands. Our research question was: *How many non-tolerated cannabis dealers are there in the Netherlands, what is their nature and what developments can be observed, partly in relation to the tolerated dealers?* By non-tolerated cannabis dealers, we mean the ones outside the officially tolerated coffeeshops. The study focuses on the retail trade and not on the coffeeshop suppliers (back door) or the middle and higher levels of the cannabis market.

In this closing chapter, we briefly describe our methods and summarize our findings on the nature of the non-tolerated cannabis market. Then we discuss the estimates of the size of the tolerated and non-tolerated cannabis markets. Lastly we list our main conclusions.

9.1 Methods

The study was conducted in ten municipalities. It was clearly not our aim to evaluate the local coffeeshop policy of these municipalities. This is why they are not specified by name, but referred to by letters (A to J). The municipalities are geographically spread throughout the country and differ as regards their size and coffeeshop density (number of coffeeshops per 10,000 residents). Eight of the municipalities have one or more tolerated coffeeshops and the other two officially do not have any coffeeshops at all. The study includes A as one of the four large cities (Amsterdam, Den Haag, Utrecht and Rotterdam), B and C as medium-sized municipalities with coffeeshop tourism, D, J and H as medium-sized municipalities with variations in coffeeshop density, E and I as smaller municipalities with variations in coffeeshop density and F and G as two municipalities without any officially tolerated coffeeshops.

The study was conducted in two stages, the first from the autumn of 2003 to the spring of 2004 and the second from the summer to the autumn of 2004. In the first stage, the study was conducted in five municipalities (A, B, C, D and E) and various methods were used, i.e. individual interviews and group talks (focus groups) with local experts in all five municipalities, a survey among cannabis users in two medium-sized municipalities with an average coffeeshop density (B and D) and a short ethnographic field study in B and D.

Based on the predominantly positive experiences in the first stage, we decided to expand the study with five other municipalities (F, G, H, I and J). In the second stage, we left out the group talks with local experts, since they had failed to make a valuable enough addition to the individual interviews. In the first stage, the survey among cannabis users seemed to provide the best estimates of the number of non-tolerated cannabis dealers and was consequently used in all five municipalities in the second stage. To further test the reliability of the questionnaire, in the second stage the survey was also repeated in municipality D, one of the two municipalities where the survey had been conducted in the first stage. The short ethno-

graphic field studies were now conducted in the two municipalities without any officially tolerated coffeeshops (F and G) and the municipality with the highest coffeeshop density (J). Individual interviews with local experts were held in all ten municipalities, group talks (focus groups) with local experts were held in four of the ten municipalities, a survey among cannabis users was held in seven of the ten municipalities and a short ethnographic field study was held in five of them. The activities can be summarized as follows:

Municipality	Type		Local experts		Survey among users	Ethnographic field study
	Number of residents *	Coffeeshop density	Group talk	Individual interview		
A	469,000	Average for G4 ⁸⁰	X	X		
B	210,000	Average	X	X	X	X
C	166,000	Average	X	X		
D	93,000	Average	X	X	XX	X
E	41,000	Above Average		X		
F	49,000	0		X	X	X
G	69,000	0		X	X	X
H	165,000	Lowest		X	X	
I	42,000	High		X	X	
J	91,000	Highest		X	X	X

* at the time of the study, rounded off

Local experts

A prerequisite for the participation of local experts in the study was that they were well informed on the local cannabis market. Most of the local experts were policy staff members or police officials and prevention or youth workers. In the first stage, policy staff members appeared to mainly consult information from the Police Department, and were thus not adding much extra information. This is why in the second stage, we did not always interview a policy staff member in addition to someone from the Police Department.

In addition, we interviewed coffeeshop owners and personnel. All these local experts were individually interviewed. Some of them also took part in a group talk. As expected, it was no simple matter to have people from the coffeeshop branch take part in group talks that policy staff members and police officials were also attending. Sometimes we were successful in getting people from the coffeeshop branch to take part, but the non-tolerated dealers were never willing to attend these talks. More generally speaking, the non-tolerated dealers were not enthusiastic at all about taking part in a group talk, not even with other local non-tolerated dealers or coffeeshop proprietors.

Survey among users

In seven of the ten municipalities, a survey was held among current cannabis users (in the past month) using a short questionnaire. This was done in the evening and at night on the street and in entertainment and shopping districts. The survey was very doable and provided useful data on almost 800 users who constitute a reasonable cross-section of the local user

⁸⁰ G4: Great four, the four largest cities of the Netherlands

population. In order to test its reliability, the survey was done twice in D. The two samples in this municipality do not differ as regards general background features or information on individual purchasing behaviour regarding cannabis. This indicates that the data are reliable. The information on procuring cannabis is somewhat less consistent. However, the information on the assumed purchasing behaviour of friends seems to be reliable on the coffeeshops, but somewhat less reliable on the non-tolerated market.

Ethnographic study

The short ethnographic field studies in five municipalities mainly consisted of observations and informal conversations. This part of the study brought us in contact with non-tolerated dealers and provided deeper and more qualitative insight into the nature of the local cannabis market. It also resulted in several extra respondents for the interviews with local experts.

9.2 Nature of non-tolerated dealers

In all the municipalities we studied, there is a non-tolerated cannabis market at the retail level. We can distinguish two main categories, i.e. fixed and mobile sale points.

- The fixed non-tolerated sales points can be divided into (1) house dealers and (2) under-the-counter dealers primarily at clubs or pubs.
- The mobile non-tolerated sales points can be divided into (1) home delivery after cannabis is ordered by telephone (06 dealers) and (2) street sales in the street and at spots where people hang out (street dealers).

Fixed non-tolerated dealers

Home dealers are active in all the municipalities. The local experts generally do not know that much about them. The survey provides more information about them and the ethnographic field studies fill in more of the details. Home dealers often operate in socio-economically poorer districts and in neighbourhoods far from the centre and the coffeeshops. There is often evidence of a self-sufficient home dealer circuit. These networks are viewed as closed. According to the police, home dealers rarely cause nuisance. Several of the municipalities have nonetheless recently taken action against this form of non-tolerated cannabis sale. In the ethnographic part of the study, we noted that some home dealers also sell to minors.

Marijuana and hashish are sold under the counter at clubs and pubs all over. In addition to the sale of cannabis at clubs and pubs with a liquor licence, to a lesser extent marijuana and hashish are also sold at places without a liquor licence such as cafeterias and coffee houses and smart shops or other stores. The locations where cannabis is sold under the counter are generally in or near the city centre.

Mobile non-tolerated dealers

In almost all the municipalities, 06 dealers have been observed who deliver orders of cannabis by scooter or car. They are observed most frequently in the two municipalities where residential neighbourhoods are spread out over a large area. In general the mobility of cannabis dealers is greater in municipalities without any coffeeshops at all and in suburbs with

very few of them. There are also 06 dealers who sell cannabis to minors. Sometimes 06 dealers can be reached via the Internet.

There are street dealers in virtually all the municipalities, who are mainly observed near train stations, schools and youth centres and at shopping malls, parks and wherever youngsters hang out. Some street dealers mainly sell cannabis to minors. They often are youngsters under the age of 20, who mostly deal part-time and look for youngsters at their schools and youth centres and wherever they like to hang out.

Other non-tolerated cannabis dealers

There are also people who grow their own cannabis. Many of these cannabis growers do so for their own use or give it to their friends and acquaintances or exchange it with them. These are often close-knit friendship networks of cannabis blowers of all ages. Sometimes they sell part of what they grow to friends, acquaintances or people in the neighbourhood. When this is the case, they can belong to one of the four categories described above, especially the category of the home dealer. There are also more commercial-minded cannabis growers who sell part of their crop to coffeeshops or sell small amounts to private parties.

Lastly, in one of the ten municipalities there is a non-tolerated fixed sales point at a kind of coffeeshop that the authorities turn a blind eye to. We could call it an under-the-counter dealer or a home dealer, but the public generally sees it as a 'coffeeshop'.

Soft and hard drugs

The study is focused on the cannabis market and not on retail dealers who solely sell hard drugs. However, all the categories of non-tolerated cannabis dealers also include dealers who sell hard as well as soft drugs. Sometimes soft drugs are their main merchandise, and in other cases hard drugs are.

Quite a few of the home dealers, especially the ones who grow their own crop, solely sell cannabis. There are also home dealers who mainly sell heroin and cocaine to addicts and sometimes also sell hashish or marijuana, but they play an extremely marginal role on the non-tolerated cannabis market. This segment is mainly separate from the larger home circuit that targets the recreational market, where dealers are active who only sell party drugs such as ecstasy, cocaine and amphetamine, though there are some who sell hard drugs as well. The same holds true of 06 dealers, some of whom mainly sell cannabis on weekdays and party drugs in the weekend. The soft and hard drug markets are usually - but not always - separate as regards under-the-counter dealers. Most street dealers are outside the scope of this study because they only sell hard drugs, in particular cocaine and heroin. They are often addicted themselves and mainly hang out in the city centre and near train stations. Some of them do however also sell soft drugs and this is precisely where there is the greatest risk of the hard and soft drug markets overlapping. In addition, there are the largely younger non-addicted street dealers who often confine themselves to the sale of soft drugs.

9.3 Gaps in the coffeeshop market

Whether or not municipalities have coffeeshops, the non-tolerated sale of cannabis goes on all over. But generally speaking, at the retail level coffeeshops sell more cannabis than non-tolerated dealers. There are various reasons why non-tolerated cannabis dealers also oper-

ate in municipalities with coffeeshops. The major reasons are the geographic distribution of the coffeeshops, their opening hours and the minimum age they adhere to. It is especially the 06 dealers and home dealers who take advantage of the geographic gaps in the cannabis market and are mainly active in districts where coffeeshops are rare or non-existent. Besides which, coffeeshops are not open 24 hours a day and the non-tolerated dealers explicitly take advantage of this by being easy to reach at times when the coffeeshops are closed. For minors, the minimum age at coffeeshops is an important reason to have hashish or marijuana delivered or to buy it on the street or from a home dealer. In addition, non-tolerated dealers can serve as an attractive alternative for coffeeshops because users can buy larger quantities of cannabis and sometimes the cannabis is sold cheaper.

9.4 Estimates of the local cannabis market

The local experts and the respondents in the survey among users both estimated the size of the role coffeeshops and non-tolerated sales points play in the local sale of cannabis in various municipalities. We confine these estimates to the non-tolerated dealers who solely or also sell cannabis, and leave out the dealers who only sell hard drugs.

It is often difficult if not impossible for local experts to estimate the number of non-tolerated cannabis dealers in their municipality. It seems the larger the municipality, the more difficult it is to make an estimate. The police mainly focus on the sales points that constitute a nuisance and focus relatively less on forms of non-tolerated cannabis sale that barely disturb the peace. This does not mean they are unaware of the non-tolerated sale of cannabis, but since it is not a priority for them in combating drug use, they are not really that involved. Prevention and youth workers have more of a total view of the situation, at any rate those of them who operate actively in the world of users on the street or at the clubs and pubs they frequent. Based on their own observations and information from users and sometimes from dealers as well, they have a better view of the dynamics and size of the non-tolerated sale of cannabis. Coffeeshop proprietors and personnel occupy a position in the middle as regards this kind of information. They are more aware of certain forms of the non-tolerated cannabis market, such as sales by home growers.

The estimates of the local experts sometimes differ greatly and are thus not so reliable. Like the experts, the users interviewed in the survey make widely differing estimates. The average figures yield estimates that are too high; the medians produce a picture that is more accurate. The figures on the respondents' own purchasing behaviour are the most reliable, and the medians yield a valid estimate. As regards the purchasing conduct of their friends, the estimates are a bit less reliable, and the estimate of the purchasing behaviour in the entire municipality is a little more unreliable.

9.5 Conclusions

Methods

- Compared to the individual interviews, the group talks with experts do not yield much extra information. This is why a monitor study should not use focus groups.

- Experts often find it difficult to make responsible estimates of the size of the local non-tolerated cannabis market. A short structured questionnaire does provide a limited remedy for this. In the larger municipalities, the most that can be done is to make estimates for each district or neighbourhood.
- Individual interviews with local experts can grant insight into the relevant qualitative developments in policy and the nature of the non-tolerated cannabis market. In a monitor study, panels of local experts could be interviewed at time intervals of one or more years to provide information on new trends.
- The survey among users provides important and reliable information on the percentage of cannabis users in a municipality who also purchase cannabis outside the coffeeshop. It is apparently not all too difficult to get a reasonably representative sample with enough respondents in the entertainment and shopping districts of the various municipalities.
- The survey has also produced items that can be used in a more general questionnaire on drug use (among schoolchildren or the general population) to get an idea of the relative size of the non-tolerated cannabis market.
- Ethnographic studies on the non-tolerated cannabis market can be effectively carried out by experienced field researchers. This is how the researchers came into contact with various insiders, including fixed and mobile non-tolerated cannabis dealers. This revealed information about how these dealers operate, which the local experts were not nearly always able to provide.
- As a result of the observations in the ethnographic fieldwork and the contacts made with teachers, schoolchildren and coffeeshop proprietors, it has become clear how minors have access to cannabis.

Nature of the tolerated and non-tolerated cannabis market

- At the retail trade level, the non-tolerated cannabis market is very similar in all the municipalities in the study.
- There is a multi-faceted market all over. It manifests itself in the same sales modes in virtually all the municipalities. There are fixed as well as mobile non-tolerated cannabis dealers all over. The fixed dealers include home dealers and under-the-counter dealers, and the mobile dealers include 06 dealers and street dealers. In addition, there are the home growers, who can be either fixed or mobile dealers.
- The market is also a diffuse one. The municipalities sometimes differ clearly in the numbers of non-tolerated sales points and the separate categories.
- There are non-tolerated cannabis dealers who only sell cannabis and there are those who also sell hard drugs or mainly do so.
- The mixture of soft and hard drugs on the non-tolerated cannabis market is generally the largest in the case of street dealers and the smallest in the case of home dealers.
- The larger the municipality, the greater the mobility of non-tolerated sales points.
- The mobility is also greater in municipalities and in neighbourhoods where coffeeshops are rare or non-existent.
- The most important reasons for consumers to buy marijuana or hashish from non-tolerated cannabis dealers are convenience, especially the distance to the coffeeshop and its opening hours, and the minimum age there.

- Home dealers often operate in neighbourhoods that are socio-economically weaker. Their customers tend to know each other and there is a “we are all friends” kind of atmosphere. There are also more home dealers in neighbourhoods further from the centre.

Size of the non-tolerated cannabis market

- The estimates by experts are not reliable enough.
- The median estimates of users on their own purchasing behaviour produce the most valid estimates.
- In the municipalities with officially tolerated coffeeshops, an estimate of approximately 70% of the local cannabis sales go directly through the coffeeshops. The higher the coffeeshop density, the greater their percentage of the local sales.
- In addition, coffeeshops are indirect suppliers of cannabis, especially via the friends of users but also via non-tolerated sales points. In addition, users from municipalities without any coffeeshops often buy cannabis in nearby municipalities that do have coffeeshops.
- In municipalities with no coffeeshops or a low coffeeshop density, users by far most frequently buy cannabis somewhere else (as well).
- In municipalities with officially tolerated coffeeshops and an average coffeeshop density, there are in estimate approximately ten non-tolerated cannabis dealers for each coffeeshop.
- On a national scale, not counting the large cities and municipalities without coffeeshops, this would amount to a few thousand non-tolerated cannabis dealers. Since they jointly account for an estimate of approximately 30% of the local sales, it seems to be mainly small-scale to extremely small-scale trade that is involved.
- The lower the coffeeshop density, the greater the number of non-tolerated cannabis dealers per coffeeshop would seem to be.
- The numbers of fixed and mobile non-tolerated cannabis dealers seem to keep reasonable pace with each other.
- In the fixed non-tolerated cannabis market, home dealers are clearly in the majority and there are relatively few under-the-counter dealers.
- The mobile dealers consist of approximately as many 06 dealers as street dealers. As to their turnover, 06 dealers probably play a larger role than street dealers since street dealers often do not solely or predominantly sell cannabis.
- There is a wide variation among the municipalities as regards the presence of the various categories of non-tolerated cannabis dealers. In each case, a different kind of sales point is most common. There is no one type that is clearly most common in all the municipalities.

Developments and policy

- In most municipalities, the cannabis market is reasonably stable and the coffeeshop policy is well regulated.
- Non-tolerated cannabis dealers are usually not perceived as an urgent problem at the local level.

- Nuisance is the main reason for police intervention at non-tolerated sales points. If there are no nuisances, the non-tolerated cannabis market is not a high police priority according to local experts. Combating the hard drug trade however, is a high priority.
- As regards the fixed non-tolerated cannabis market, the police draw a distinction between user houses and other dealers. When they raid user houses, they mainly find hard drugs and only sporadically cannabis.
- Minors most frequently buy cannabis by having someone else buy it for them at a coffeeshop. They themselves do sometimes buy cannabis at a coffeeshop, but much less frequently than users who are no longer minors. It is also reasonably common for them to buy at non-tolerated sales points, i.e. from 06 dealers, home dealers and street dealers.
- Most street dealers who mainly sell cannabis also sell it to minors. They are often still minors themselves who want to earn a bit of extra cash.
- Many of the users in municipalities without coffeeshops get their cannabis in a municipality with one or more coffeeshops.