

Chapter 9 – Alcohol policy in the countries of Europe

Every country in the European Union (EU) has a number of laws and other policies that set alcohol apart from other goods traded in its territory, often for reasons of public health. These policies take place in a specific cultural setting (see Chapter 2) and are also adopted and enforced in the context of people's views on alcohol policy. These currently seem to be most in favour of controls on advertising and young people's drinking, although evidence is scarce in this area. Where a thorough European investigation has been done, most European drivers have been found to support a complete ban on alcohol use by new drivers, and many are in favour of a ban for all drivers.

Despite the ubiquity of alcohol policies, just under half the EU countries still do not have an action plan or coordinating body for alcohol. Even so, most countries have programmes for one aspect of alcohol policy, of which school-based education programmes are the most common throughout Europe. All countries also have some form of drink-driving restrictions, with everywhere except the UK, Ireland and Luxembourg having a maximum blood alcohol limit for drivers at the level recommended by the European Commission (0.5g/L). However, many European drivers believe that there is only a slim chance of being detected - a third overall believe they will never be breathalysed, although this is lower in countries with Random Breath Testing.

Sales of alcohol are generally subject to restrictions in most EU countries, in a few cases through retail monopolies but more often through licences, while the places that alcohol can be sold are frequently restricted. Over one-third of countries (and some regions) also limit the hours of sale, while restrictions on the days of sale or the density of off-premise retailers exist in a small number of countries. All countries prohibit the sale of alcohol to young people beneath a certain age in bars and pubs, although four countries have no policy on the sale of alcohol to children in shops. The cut-off point for allowing sales to young people also varies across Europe, tending to be 18 years in northern Europe and 16 years in southern Europe.

Alcohol marketing is controlled to different degrees depending on the type of marketing activity. Television beer adverts are subject to legal restrictions (beyond content restrictions) in over half of Europe, including complete bans in five countries; this rises to 14 countries for bans on spirits adverts. Billboards and print media are subject to less regulation though, with one in three countries (mainly in the EU10) having no controls. Sports sponsorship is subject to the weakest restrictions, with only seven countries having any legal restrictions at all.

The taxation of alcoholic beverages is another consistent feature of European countries, although the rates themselves vary considerably between countries. This can be seen clearly for wine, where nearly half the countries have no tax at all, but one in five countries has a tax rate above €1,000, adjusted for purchasing power. In general, the average effective tax rate is highest in northern Europe, and weakest in southern and parts of central and eastern Europe. Four countries have also introduced a targeted tax on alcopops since 2004, which appears to have reduced alcopops consumption since.

When the different policy areas are combined into a single scale, the overall strictness of alcohol policy ranges from 5.5 (Greece) to 17.7 (Norway) out of a possible maximum of 20, with an average of 10.8. The least strict policies are in southern and parts of central and eastern Europe, and the highest in northern Europe – but the scores do not all decrease from north to south, as seen in the high score in France. Most countries with high policy scores also have high

taxation levels, but there are some exceptions such as France (high policy score, low tax), Ireland, and the UK (both low policy score, high tax).

This picture of alcohol policy is very different from the one visible fifty years ago, with the overall levels of policy much closer together, partly due to a weakening of the availability restrictions in the northern European countries. However, the main factor in the policy harmonization is the increased level of policy in many countries, particularly in the area of drink-driving where all countries now have a legal limit. Marketing controls, minimum ages to buy alcohol, and public policy structures to deliver alcohol policy are also much more common in 2005 than in 1950. While European countries are, therefore, ahead of the world in print advertising restrictions and drink-driving limits, they are less likely to have high taxes or controls on availability such as limits on the days and hours of sales, or licences for the retail sale of alcohol.

THE SOCIAL CONTEXT OF ALCOHOL POLICIES

It has already been shown in Chapter 8 that alcohol policies need to be considered within an international setting. In similar fashion, the social and political environment within a country both shapes and is shaped by national alcohol policies. In a broad sense this includes both contemporary culture and epochal cultural change (such as the rise of respectability in the eighteenth century), but, to the extent these can be covered within this report, they are discussed elsewhere (see Chapters 2 and 4). The comparison of alcohol policies in Europe therefore begins by examining the narrower aspect of the public's perception of alcohol policies.

Public attitudes

Popular perceptions of actions and responsibilities relating to alcohol are of an obvious importance for policy-making, with policy-makers both contributing to perceptions as well as responding to them (see Simpura *et al.* 1999 for a discussion of different attitudes in the social elite). Unfortunately European comparative work on public attitudes has been restricted to two areas – drink-driving, and whether people agree that “*the government has a responsibility to minimize how much people drink.*” On the latter question, people in Italy, Sweden, Poland and the Baltic countries (and to a lesser extent France) agreed it was the government's responsibility, while those in Germany and Finland disagreed (Hemström, Leifman, and Ramstedt 2001; Reitan 2003). Respondents in the UK were ambivalent about the government's responsibility to minimize people's drinking, but very strongly agreed in a separate study that the government had a responsibility to reduce “alcohol abuse” (conducted for the Institute of Alcohol Studies by NOP Market Solutions 2000). However, this overall method used only one question with many possible meanings, and there were also some concerns as to the reliability of the Western European results in the ECAS survey (see Chapter 4).

The most reliable comparisons come in the area of drink-driving policy, where a series of large projects part-funded by the European Commission have looked at a number of road safety risks (Sartre 1995; Sartre 1998; Sardi and Evers 2004). The most extensive of these found that an overwhelming majority (82%) of drivers in the EU believed that there should be complete ban on alcohol use in newly-qualified drivers, with support increasing by over ten percentage points since the mid-1990s. Slightly fewer EU15 drivers (40%) believed in a complete ban for all drivers, although the seven EU10 countries covered were in favour of this measure overall, including

clear majorities in the Czech Republic, Hungary and Slovakia where such bans already exist. The Commission's Recommendation of a maximum BAC of 0.5 g/L (see Chapter 8) is also positively viewed, with those countries having this limit seeing it most favourably, but three-quarters of those in countries with a BAC of 0.8 g/L also in favour. Only in Cyprus (where drink-driving is most common; see Chapter 6) and countries with limits already below 0.5g/L did the level of support for this level drop to half the population or below.

Aside from these wide comparisons, there have been a small number of other studies looking at individual countries or small country groups – although it should be remembered that these are often difficult to interpret and some have methodological weaknesses (see discussion in the earlier review by Crawford 1987). More problematically, results from opinion polls or attitude surveys depend on the phrasing of the question, and opinion polls can also show large swings in relatively short time periods. For example, research by the Swedish National Public Health Institute found only 36% of respondents were against any strong beer, wine or spirits being sold in grocery stores – but this doubled to 72% when people were told about the expected increase in alcohol-related violence and teenage alcohol consumption (cited in Mäkelä *et al.* 1999). Bearing this in mind though, it appears that there are some similarities across Europe in public attitudes, particularly towards advertising restrictions and policies focused on young people.

Advertising controls seem to be widely supported in Europe, with at least two-thirds of the respondents in favour of some form of partial restrictions in Ireland, Latvia and Estonia – together with a smaller majority in favour in Poland, and indicative support in a small sample of young people in England (Baltic Data House 2001; Reitan 2003; Strategic Task Force on Alcohol 2004; Hanekom 2004).¹ The stronger measure of a complete prohibition on alcohol advertising is approved by just over 4 in 10 Rotterdam citizens in 1994 and 2 in 10 UK citizens in 2000 (Pendleton, Smith, and Roberts 1990; Bongers 1998; NOP Market Solutions 2000).

Greater restrictions on young people's drinking also tend to be widely supported, including a minimum age to buy alcohol of at least 18 (Rotterdam; UK), a ban on children in pubs after 7pm (Ireland), and greater enforcement of the legal purchase age (in the UK; see Pendleton, Smith, and Roberts 1990; Lancaster and Dudleston 2002; and more recently BBC News Online 2004). No specific policy measure was suggested in the Baltic and Poland comparison, but the wide perception of 'drinking among children and youths' as the most serious alcohol-related problem (67-81% of respondents believing it to be very serious) suggests that a similar targeting of policy would also meet with public approval (Reitan 2003). Similarly, 94% of a sample in Scotland felt there was a problem with underage drinking in their country – a feeling also expressed by a number of respondents who were under the legal age limit themselves (Kara and Hutton 2003).

In other areas the research results are more ambivalent. A desire for increased availability of alcohol (such as alcohol sales outside of monopoly stores) was visible in the late 20th century in Finland, Norway and Sweden, although this has reduced slightly in recent years (Olsson, Nordlund, and Järvinen 2000). In contrast, there is strong support for an alcohol retail monopoly in Poland and the Baltic countries, and a referendum in the Estonian capital of Tallinn came out strongly in favour of a ban

¹ Lithuania respondents slightly disagreed with advertising restrictions, but there are some uncertainties as to the reliability of this data in the light of the very high number of 'don't knows' (Reitan 2003).

on alcohol sales between 11pm and 8am.² Differing views are visible for reducing the number of shops selling alcohol, which is supported in Latvia (see also Koroleva 2005), opposed in Lithuania and the Netherlands (and possibly Denmark too, given their high satisfaction with the existing number of restaurants and cafes; Elmeland and Villumsen 2005), and has split support in Poland and Estonia. In most studies of most policies, the heaviest drinkers were the group most likely to be against a policy measure (Hemström, Leifman, and Ramstedt 2001; Hemström 2002; Reitan 2003; Strategic Task Force on Alcohol 2004; BBC News Online 2004).

In conclusion, there has been little research to date on public attitudes to alcohol policies in Europe. It is conceivable that restrictions on young people's drinking and advertising are more widely supported than other areas, but more research is needed in this area before this can be stated with any degree of confidence. Only in the area of drink-driving is there reliable data, showing that a majority of European Union (EU) drivers support a complete ban on drinking for new drivers.

ALCOHOL POLICY IN THE COUNTRIES OF EUROPE

In a different way, the policies adopted by a country are also a barometer of the response to alcohol, and it is fortunate that much better data on this are available than for opinion polls. This enables a policy-by-policy comparison in a number of key areas, as well as several comparisons of the 'overall level' of alcohol policy in the countries and Europe as a whole (see Figure 9.1 for a guide to these comparisons).

The data for this come from the Global Status Report on Alcohol Policy (WHO 2004), updated by the Alcohol Policy Network which is co-financed by the European Commission.³ However, for some countries these policies are decided on a regional rather than country level, meaning that there is no single 'minimum age to buy alcohol in Spain', for example. In these countries (Austria, Spain and Switzerland in particular), the least strict of the regional policies is used to represent the national situation, as this was felt to reflect better the country response than the most strict region. However, where a more strict policy is much more common, this has been mentioned in the discussion.

The framework for policy

The starting point for dealing with alcohol on a country level is to decide what an alcoholic beverage is. Although there are internationally agreed definitions of alcohol for the purposes of classifying trade (see Chapter 1), most countries go further for the purposes of their own alcohol

Box 9.1: Framework for policy

- Most countries define alcohol as less than 2% absolute volume
- Just under ½ of countries do not have an action plan or coordinating body
- Nearly all countries have 'moderately developed' school programmes

² Information from the Estonian member of the Alcohol Policy Network.

³ Data from the APN was received between Nov 2004 and Feb 2005, and is publicly available at <http://www.eurocare.org/btg/countryreports/index.html>; it was also checked and occasionally supplemented by the WHO-EURO's Alcohol Control Database (<http://data.euro.who.int/alcohol/>). Conflicting data is addressed in the main text wherever it affects the conclusions drawn.

laws. In general, the countries of Europe fall into the World Health Organization's (WHO) 'low' definition band, which defines the maximum level of alcohol for a 'non-alcoholic' drink at 2% alcohol concentration or less. However, several countries (all in Northern Europe) have slightly higher definitions of 2-3%, while Romania and Slovakia do not define alcohol in this way at all. Clearly anomalous in this context is Hungary, whose definition of 5% alcohol concentration – above the level of most beers – is only significantly exceeded by two other countries in the world. In comparison, the EU's definition of alcohol for tax purposes is at least 0.5% (for beer) or 1.2% alcohol concentration (for all other drinks).⁴

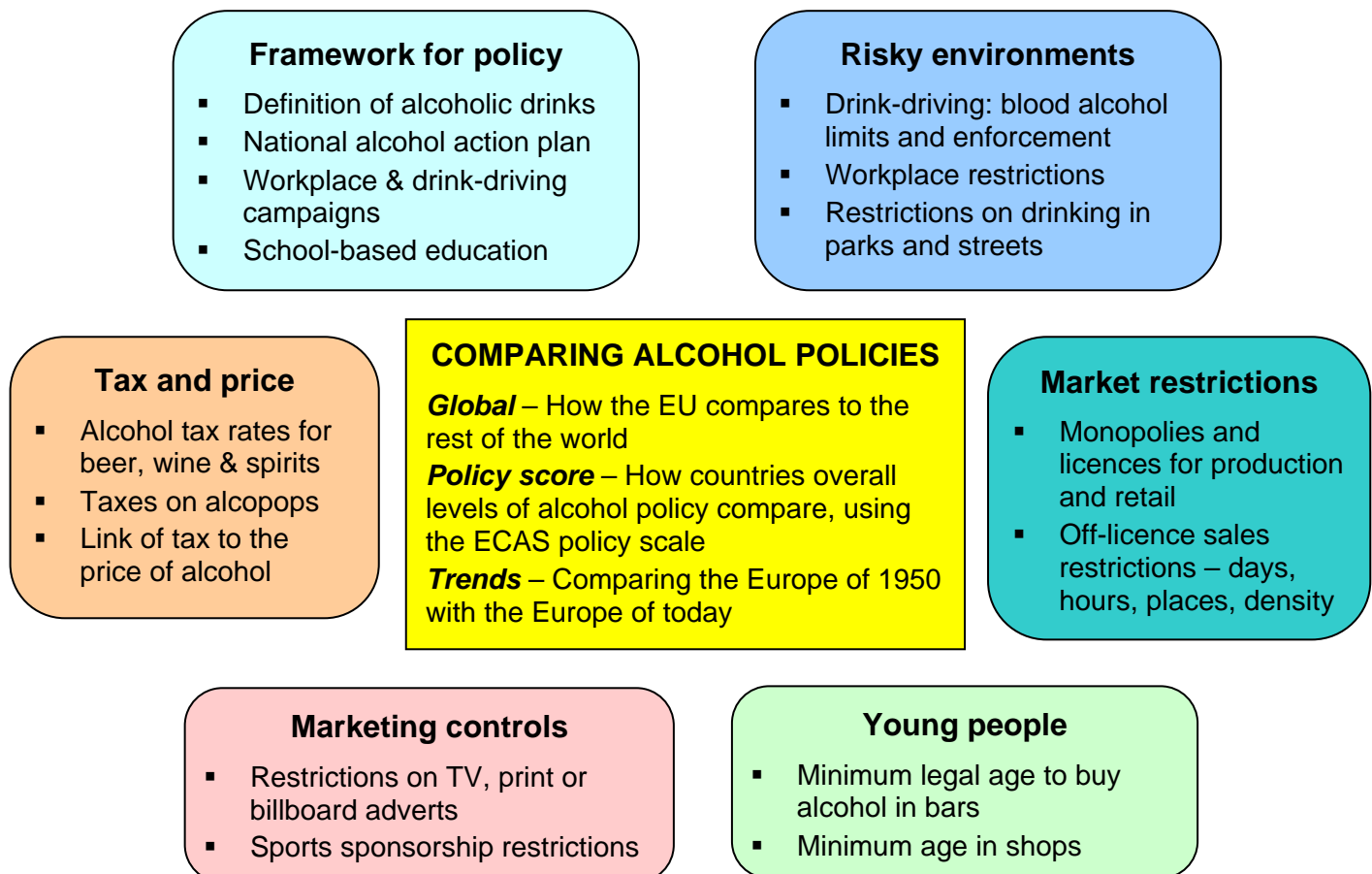


Figure 9.1 A guide to the organization of alcohol policy comparisons in this chapter

The structure of alcohol policy further provides a useful background to the specific laws covered below. In just over half the EU countries this structure involves an action plan and/or a coordinating body, but this still leaves a number of other countries scattered across Europe who leave alcohol policy to the intersection of

⁴ Many countries also have definitions of 'low alcohol' beverages (especially beer) that are subject to fewer restrictions, e.g. only beer below 4.2% alcohol concentration can be sold on trains in the Czech Republic. For tax purposes, the EU definitions of the highest concentration that counts as low-alcohol are 2.8% for beer and 8.5% for wine and intermediate products. Details of both normal and low-strength definitions can be found in 92/83/EC.

more general departments. The Global Status Report also provides the country source's opinion of the status of alcohol awareness programmes in their country – this is a useful indication of how active the government has been, but is only a subjective measure. Bearing this in mind, it seems that EU15 states were more likely to have better developed workplace and drink-driving campaigns than EU10 states. On the other hand, only two countries – Greece and Portugal – do not have 'moderately developed' school-based alcohol programmes, suggesting that the EU10 has well-developed awareness campaigns in some areas despite lagging behind in others.

Risky environments: driving and working

One of the most common forms of alcohol policy is restricting drinking in inappropriate situations, often instigated by organisations with a remit that is broader than alcohol. The most common example of this is for drink-driving, where insurers and road safety organisations have seen alcohol as a major risk factor for driving-related damage and loss of life. In line with the Commission Recommendation discussed in Chapter 8, most of the EU15 countries have a maximum Blood Alcohol Concentration (BAC) of no more than 0.5g/L, although the UK, Ireland and Luxembourg continue to have a higher limit. Limits in the EU10 tend to be even lower, with three countries (Czech Republic, Hungary and Slovak Republic, as well as Romania) prohibiting any alcohol in drivers and three more having levels lower than the majority of the EU15. Outside of the EU, the international community is more likely to have a limit of 0 – yet they are substantially more likely to have BACs above the EU Recommendation as well, with fewer countries lying between the two extremes. Some European countries also have different BACs for different groups, such as the 0.3g/L limit for novice and professional drivers in Spain.

Box 9.2: Risky environments

- Only 3 EU countries have a blood alcohol limit higher than 0.5g/L
- Three-quarters of drivers believe they will be rarely or never be breathalysed. The perceived chances of being tested are higher in countries with RBT.
- Workplace alcohol bans are common in the EU10, but voluntary control is more popular in the EU15

As outlined in Chapter 7, an essential component of an effective drink-driving policy is enforcement, particularly using random breath testing. Data on the perceived chances of being breathalysed are available from the SARTRE project, which has been part-funded by the European Commission (Christ 1998; Sardi and Evers 2004). Across 21 EU countries (and Switzerland), nearly 30% of drivers believe they will never be breathalysed, with a

further 45% believing they will only be breathalysed rarely. This correlates moderately strongly with drivers' own experiences of being breathalysed, with over 70% of drivers saying they have not been checked for alcohol in the last three years.

Although the perceived chances and experience of checks are lower in some countries than others, there appears to be no consistent geographical pattern to this – for example, drivers from Italy, Spain and Greece perceive low chances but so do those from the UK, Poland and Sweden, while those from France, Portugal and Slovenia see the chances as much higher. In contrast to the WHO's analysis of its country informant ratings, there is also no correlation in Europe between the BAC

and perceived levels of enforcement. However, a policy of Random Breath Testing (RBT; see Chapter 7) made a significant difference to drivers' experiences and perceptions of alcohol checks. In the six SARTRE countries where RBT was not allowed (Germany, Ireland, Italy, Poland, the UK and Switzerland⁵), 86% of drivers had not been checked in the past three years compared to only 65% elsewhere. The effect was even stronger for drivers' perceptions – in the countries with RBT only 22% of drivers thought they would never be checked, compared to more than double this figure (46%) in the six countries without RBT.

Another frequently restricted environment is the workplace, probably due to both reduced productivity and a greater risk of workplace accidents with those who have drunk alcohol. In the EU10 these restrictions are nearly always in the form of a complete ban on alcohol use in the workplace, while the preference in the EU15 is for voluntary or local action. Despite the absence of any controls in Greece (as well as Switzerland), the EU is much more likely to have at least a voluntary control on workplace drinking compared to the rest of the world, although as with drink-driving this is substantially less likely to be a complete ban. Similarly, bans on alcohol consumption in educational, healthcare and government establishments are often forbidden, and these follow a near-identical pattern in Europe.

A final area where drinking is often restricted is public spaces such as parks and streets. This tends to be less motivated by preventing harmful alcohol use and more focused on public disorder, nuisance, and anti-social behaviour. As such, it more often has a legal base in countries where there is strong public concern over anti-social behaviour, primarily in eastern and northern Europe (e.g. Belgium, Latvia). Elsewhere there is a roughly equal tendency to either have no restrictions, or to devolve these decisions onto a local level where they can be adapted to the particular situation in a locality. As for workplace restrictions, the EU overall is more likely than the rest of the world to have a policy but less likely to have a complete ban on public drinking (a policy pursued in Europe by Latvia alone).

Market restrictions

Retail monopolies are relatively uncommon within the EU, particularly given the EU-level cases over the past 15 years discussed in Chapter 8 (Österberg and Karlsson 2002) – which has sometimes even induced countries to privatize in anticipation of EU membership talks, as in the case of Turkey in 2003. Only the four northern European countries maintain a retail monopoly adapted to the needs of EU/European Free Trade Association (EFTA) membership, with the majority of countries instead requiring special licences to sell alcohol. A minority of countries do not even require licences for any alcoholic drink, and these are generally situated in a geographically continuous area of central and eastern Europe (Austria, Belgium, Czech Republic, Germany, Slovak Republic, Slovenia, Switzerland; and also Spain).

A similar pattern is visible for off-licence sales restrictions (unfortunately no comparable data are available for on-licences). The most common policy here is to restrict the places at which alcohol can be sold (for example, not within 500m of a school), which is practised in most countries. Eleven of the study countries restrict the hours of sale (for Latvia excluding beer), while six restrict the days of sale and

⁵ Switzerland introduced RBT (as well as a BAC of 0.5g/L and 'cascading' penalties) on 1 January 2005 – see the European Transport Safety Council's Enforcement Newsletter for Dec 2004 (www.etsc.be).

five regulate the density of alcohol retailers (the EU figures are nine, three, and four countries respectively).⁶

Again, a cluster of central and eastern European countries have none of these restrictions (Austria, the Czech Republic, Germany, Luxembourg and Slovakia) together with several southern European countries (Portugal, Italy and Greece; also Spain on a country basis). In contrast, Sweden, Finland and Norway have all types of restrictions (if not for all beverages). Nevertheless, this should not be understood as a simple cultural or geographical divide – for example, France has density and place restrictions that are absent in Denmark and Iceland, while some regions of Spain also strictly control off-licence sales.

Of the 14 countries with information on how these restrictions are enforced, only two (Hungary and Romania) describe rare or nonexistent enforcement. While these country-based opinions should be treated with some caution, they do suggest that enforcement is better in Europe than in the rest of the world with the exception of North America.

Controlling sales to young people

Besides the general restrictions on availability, all of the study countries have

Box 9.3: Young people

- Everywhere has adopted a minimum age of 16-20 years to buy alcohol in bars
- The minimum ages are often lower in southern than northern Europe
- Four countries have no restrictions on alcohol sales to children in shops

decided that only people above a certain age should be able to buy alcohol, Table 9.1. This policy splits Europe cleanly into two – the Nordic countries, Denmark, UK, Ireland and the EU10 have a minimum age of 18 to purchase beer in a bar, while the rest of the EU15 opt for a lower age of 16 (the only partial exceptions are Malta (at 16), Greece (17), $\frac{3}{4}$ of the Spanish regions (18) and Iceland (20)), Figures 9.2 and 9.3. The gap is even more striking for shop sales, with

some southern/central countries sometimes not even having a minimum age, compared to the northern countries that put the limit at 18-20 years as before. This picture changes slightly when buying spirits rather than beer or wine (both on- and off-premise), as this is treated more severely by some of the central European countries leaving only those in the south of Europe with lower ages.

It is also evident that different countries view the different types and places of alcohol differently when it comes to young people. Strikingly, most countries treat spirits more severely than beer or wine, with the exception of the EU10 where the beverages are treated consistently. Equally, a number of countries have a more relaxed policy for off-premise sales than for on-premise, either by reducing the age to buy in shops (Denmark) or simply abandoning the age restriction altogether (Belgium, Greece, Luxembourg, Malta) – although in contrast the minimum age in Sweden is raised from 18 to 20 years for shop sales. Compared to the rest of the world (for beer only, both on- and off-premise), EU states are much more likely to have a minimum age to buy alcohol. However, countries that do have a policy

⁶ The Licensing Act 2003 comes into effect in England & Wales at the end of 2005; the situation as of 1 Jan 2005 has been used for comparison, although the legal change should be borne in mind.

choose an older age than the EU on average; in particular, a legal purchase age of 16 years is virtually unique to the EU.

Table 9.1 The legal purchase age for alcohol in Europe.

<i>B = Beer</i>	Min. Legal Age					Min. Legal Age			
	<i>On-premise</i>		<i>Off-premise</i>			<i>On-premise</i>		<i>Off-premise</i>	
	<i>B&W</i>	<i>S</i>	<i>B&W</i>	<i>S</i>		<i>B&W</i>	<i>S</i>	<i>B&W</i>	<i>S</i>
<i>W = Wine</i>									
<i>S = Spirits</i>									
Austria	16	16-18	16	16-18	Lithuania	18	18	18	18
Belgium	16	18	None	18	Luxembourg	16	16	None	None
Bulgaria	18	18	18	18	Malta	16	16	None	None
Czech Rep.	18	18	18	18	Netherlands	16	18	16	18
Denmark	18	18	16	16	Norway	18	20	18	20
Estonia	18	18	18	18	Poland	18	18	18	18
Finland	18	18	18	20	Portugal	16	16	16	16
France	16	18	16	16	Romania	18	18	18	18
Germany	16	18	16	18	Slovak Rep.	18	18	18	18
Greece	17	17	None	None	Slovenia	18	18	18	18
Hungary	18	18	18	18	Spain	16-18*	16-18*	16-18*	16-18*
Iceland	20	20	20	20	Sweden	18	18	20	20
Ireland	18	18	18	18	Switzerland	16	18	16	18
Italy	16	16	16	16	Turkey	18	18	18	18
Latvia	18	18	18	18	UK	18	18	18	18

* Minimum legal age in Spain is 18 in all but 4 regions. Source: Global Status Report on Alcohol Policy (WHO 2004) and updates from the Alcohol Policy Network co-financed by the European Commission.

While the legal purchase age has been shown to be an effective policy (see Chapter 7), levels of enforcement seem to be highly variable within Europe given the very weak relationship between perceived availability and the statutory minimum age.⁷ Beer is seen as the most available type of drink, and is seen as easily available by over 90% of students in central and eastern Europe (as well as Italy, Greece and Bulgaria) and over 80% of students elsewhere (except France and Turkey). Students feel spirits are much less available, yet over 80% of students still thought they were easy to get hold of in some countries (e.g. Italy, the Czech Republic) – only in the Nordic and Baltic countries (and Turkey) did the figures drop significantly.

⁷ 'Perceived availability' is the self-reports of 15-16 year old students in the ESPAD 2003 study (see Chapter 4).

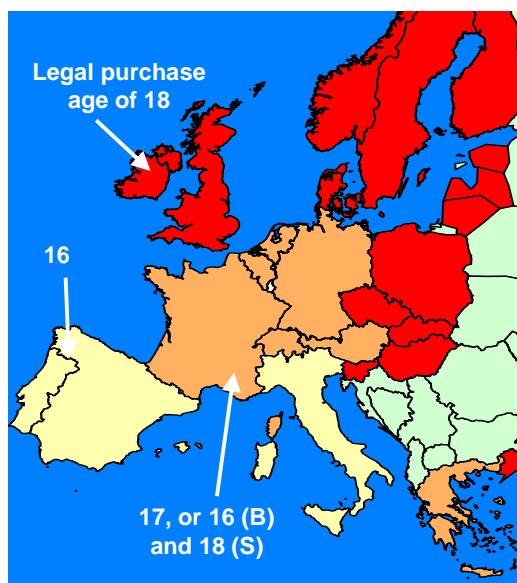


Figure 9.2 Minimum legal purchase age from **bars**
 Source: WHO 2004 and APN

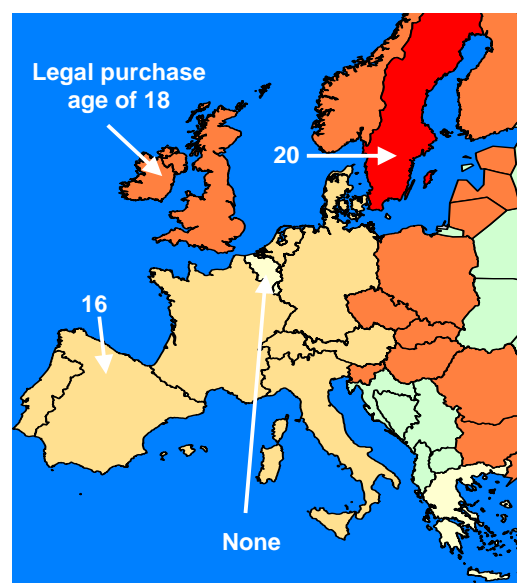


Figure 9.3 Minimum legal purchase age of beer from **shops**
 Source: WHO 2004 and APN

Volume of alcohol marketing

Given the range of media containing alcohol marketing, it was decided to restrict the analysis to three of the more prominent types – national television, print media and billboards – as well as restrictions on sponsoring sports events. For each of these, country informants said whether there were:

- *Voluntary agreements* (also including delegated powers to regions)
- *Partial legislation* (by hours, type of programme/magazine, saturation limits, or place of advertisement, but *not* including content restrictions such as those in the EU-wide Television Without Frontiers Directive (TVWF); see Chapter 8).
- *A complete ban* on that form of alcohol advertising.

Given that the definition used for ‘partial legislation’ does not include content restrictions, and that all EU member states are legally obliged to have content restrictions in line with the TVWF Directive, it should be remembered that the discussion here concentrates on restrictions on the *volume/placement* of marketing rather than its’ content.

Box 9.4: Controls on the volume of marketing

- TV adverts are controlled by law in over ½ of Europe, including complete bans in five countries
- One in three countries (mainly in the EU10) have no controls on print or billboard ads
- Only seven countries have legal restrictions on sports sponsorship

Television adverts for alcohol are subject to legal control in just over half of Europe, although this in the form of a complete ban in only five countries (of which only France and Sweden are in the EU).⁸ Voluntary agreements are relatively common in the EU15, but these are not present in the EU10 where many countries have no controls at all. As with the legal purchase age, EU states – especially those in the EU10 – control spirits advertising more tightly than wine or beer, to the extent that EU states are more likely to have complete bans on spirits than any of partial restrictions, voluntary agreements or no restrictions individually (although not combined). This change between drinks types is also much stronger than the rest of the world, meaning non-EU countries are more likely to have complete bans on beer TV advertising than EU states but less likely to have bans for spirits.

Controlling alcohol advertising in print or on billboards is noticeably less common than for television, with 1 in 3 European states not having any policy on them at all. Most of the uncontrolled advertising environments are found in eastern Europe (the EU10, Bulgaria and Romania); as before, EU15 states often have voluntary agreements with only Greece, Luxembourg and Portugal lacking even these. Internationally the levels of voluntary agreements are only a third of the EU level, although both complete bans and complete deregulation are more frequently used. Raised restrictions for spirits are less common than for TV but are still used in five countries for print advertising and four for billboards – most strikingly, while only Norway has a complete ban on print adverts for alcohol, a further three countries have bans specific to spirits (Finland, Poland and Slovenia).

Sponsorship represents another way for alcohol producers and retailers to link brands to attractive lifestyles (see Chapter 7). However, sponsorship controls have tended to be slightly less widespread than those for television advertising, with only seven countries having any legal restrictions on sports sponsorship together with voluntary restrictions in a further five. Legal controls over youth event sponsorship are even less likely, being adopted only in six countries (Finland, France, Norway, Poland, Latvia, and Switzerland). In both cases, the EU is more likely to have some policy than the rest of the world but less likely to have legal restrictions, particularly complete bans.

TAX AND PRICE

Tax is a particularly hard policy to compare across countries due to the complexity in how it is calculated, as well as the difficulties in comparing monetary values across different contexts. To get around this, three methods have been used:

1. The rates in Euros (€) were calculated for a 'standard' strength of each drink type.⁹ The tax levels shown are for a given amount of alcohol rather than for the original beverage (i.e. for one hectolitre of pure alcohol – *hlpa* – rather than for a bottle of wine) – which enables the tax on alcohol itself to be compared.

⁸ In Denmark there is a complete ban on one of the state channels, but alcohol advertising is unregulated on the other national commercial channels.

⁹ Data from CEPS (the spirits industry body), as of 1 February 2005.

2. These figures were converted to 'purchasing power parity (PPP)' to take into account the different costs in different countries, thereby giving a truer comparison of the impact of the tax on each country's citizens.¹⁰
3. Finally, the WHO report asked country representatives around the world for the alcohol-specific tax expressed as a percentage of the shop retail price. These data are less reliable and only cover 14-19 EU countries (depending on the beverage), but allow an analysis of how the EU relates to the rest of the world.

Comparing tax rates across Europe

Looking at **beer** using the first method, the tax rate can be seen to vary widely within the EU (from €181 in Spain to €1,987 in Ireland) and even further for other study countries (in Norway it is €4,335). This breadth is only slightly reduced when adjusting for purchasing power, with most countries lying between €150-700 after which there is a jump up to the seven countries at €1,250 and beyond. Adjusted for purchasing power, the lowest taxes are found in southern Europe, Romania, and parts of central Europe (e.g. Germany) where taxes are lower than €PPP400 per hectolitre of pure alcohol (hlpa). Other parts of the EU10 and central Europe range from €PPP400-1000, with higher rates in Poland and the Baltic countries (€PPP1000-1500), and the highest values (over €PPP1500) in northern Europe, the UK and Ireland. Compared to the rest of the world (using the third method from WHO data), these tax rates are lower than outside Europe with 1 in 3 EU countries lying in the WHO's 'low' range (less than 10% of price) compared to 1 in 5 elsewhere, and only 1 in 14 EU countries in the 'high' group compared to 1 in 4 globally.

For **wine**, the picture changes substantially – the average of around €800 is the same as for beer, but half of Europe has no tax whatsoever on wine. Even among countries with taxes above zero the range is enormous, with Hungary and France taxing wine less than €PPP60 compared to more than €PPP1,000 in 20% of other countries. The resulting pattern is clear: no country south of Poland has a significant tax on wine (including Germany and Austria), while the highest rates are found in northern Europe, the UK, Ireland, and the Baltic countries. Unsurprisingly then, Europe has very low taxes on wine compared to the rest of the world, with 57% of countries in the 'low' band (compared to 21% elsewhere) and only 11% in the 'high' band (33% elsewhere). More surprising is that the very low PPP tax rate in Hungary converts to a very high percentage of the total price, simply because wine prices are so low there.

Compared to beer and wine, **spirits** are much more heavily taxed: the € and €PPP average rates are both around 2,000, which is around two-and-a-half times that of other beverages. The *lowest* PPP rate for spirits (€PPP650 in Cyprus) is still greater than the wine and beer tax rates for two-thirds of countries, while the highest rate (€PPP6,400 in Iceland) is 50% greater than the highest for other drinks types. Indeed, every EU country has a higher spirits rate than for beer/wine, and this raises the EU taxes to the same average share of price as the global situation. Although the spread of tax rates is much less for spirits, the lowest values are still found in many of the same countries as for beer, i.e. some southern European countries (Bulgaria,

¹⁰ Purchasing power parity (PPP) allows costs to be scaled by the relative prices in different countries, so that the figures would buy the same amount of goods in each country. The resulting values are therefore in purchasing-power adjusted euros, or '€PPP'.

Cyprus, Greece, Italy, Malta, Portugal, Romania, Slovenia), and several central European countries (Germany, Austria, Luxembourg).

'Average tax rates' and the final price

The policy implications of the different tax rates also depend on how important each type of drink is within a country. For example, a low spirits tax is much more important in practical terms when spirits are the most common type of alcoholic drink. Looking, therefore, at the average effective tax rate in each country in Figure 9.5,¹¹ the highest tax rates are found in northern Europe, the Baltic countries, the UK, Ireland and Poland. Conversely, the lowest rates are found in southern and parts of central Europe, with the rest of central and eastern Europe lying in-between.

It should be borne in mind at this point that alcohol-specific taxes do not automatically determine the final price seen by the consumer in each country. Even just within the tax system, all countries also have a general sales tax (VAT) on alcoholic drinks and this can be as low as 7.6% or as high as 25% in the study countries. Fortunately for analytic purposes, VAT within the EU is more consistent (15%-25%) and correlates reasonably well with the excise tax rates – Portugal and Luxembourg even decrease the VAT rate on wine compared to other drinks, just as they decrease their excise tax.

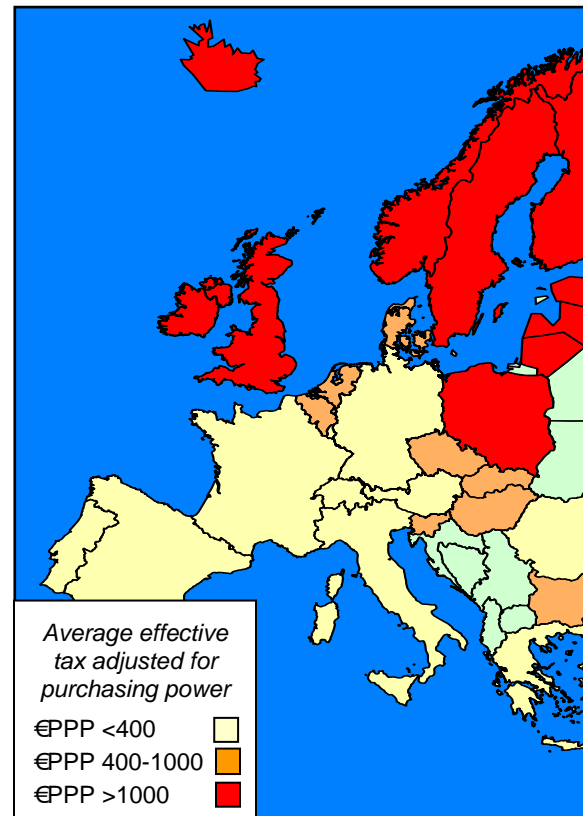


Figure 9.5 Average effective tax rates in EU countries

Beyond this, there are a large number of other potential market and cultural factors that can intervene between the tax rate and the final price. Even just comparing the prices of beer and cola (data from WHO 2004), we find that there is no relationship between alcohol taxes and the ratio of alcohol to soft drink prices. Comparing alcohol prices to that of all other goods,¹² Figure 9.6 shows that a *low* tax rate can coexist with either a high or low relative price of alcohol – but a *high* tax rate tends to produce a high price.

¹¹ The average adjusted tax rate is the effective tax rate on alcoholic drinks as a whole, adjusted for different purchasing powers in different countries (i.e. the beverage-specific tax rate in €PPP multiplied by the proportion of alcohol consumption that occurs from that beverage). Countries where most of the consumption is an untaxed drink (e.g. wine in Italy) therefore have a very low effective tax rate.

¹² Data on Price Level Indices (PLIs) was taken from the Eurostat NewCRONOS database, and is provisional 2003 data. The alcohol PLI shows the difference in retail (off-premise) prices for alcohol across the EU25 – this was then compared to the general goods PLI to show the relative price of alcoholic drinks compared to other goods.

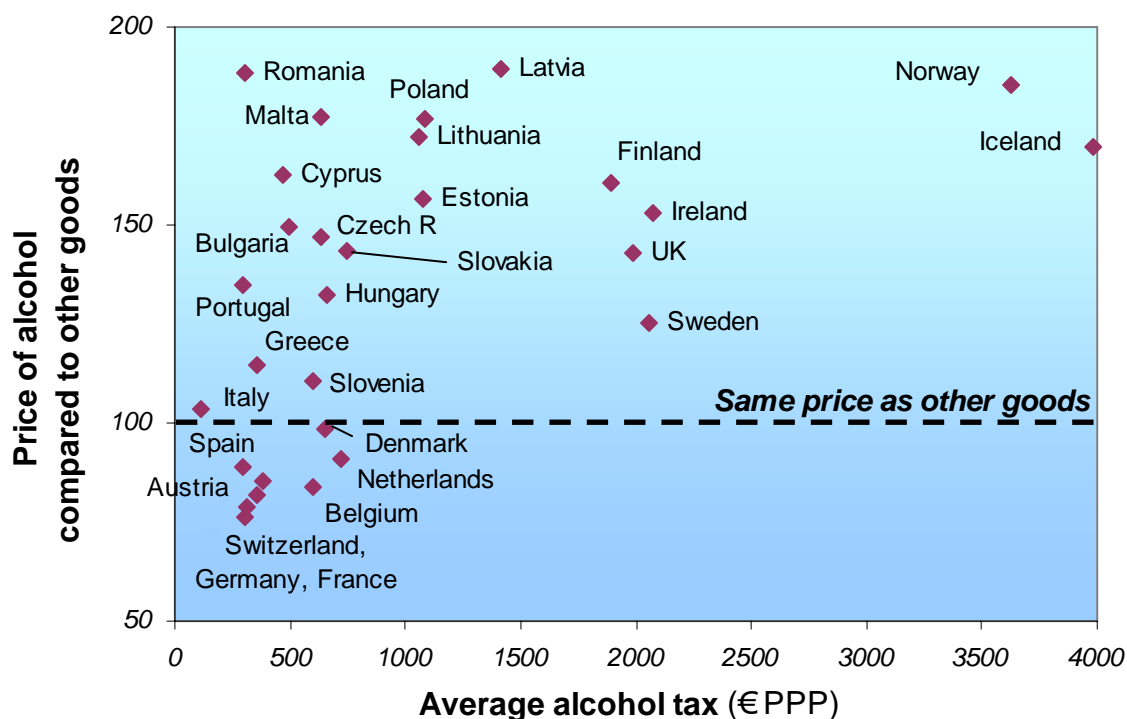


Figure 9.6 Alcohol taxes and the relative price of alcohol. Both measures are the authors' calculations from public data; see footnotes 11 and 12, p385 for details.

In general prices are highest in eastern Europe (except Slovenia), even where the tax rates are relatively low (such as in Bulgaria and Romania). Using 100 to mean that alcohol prices are roughly equivalent to general prices, much of southern and central Europe is less than 90 while virtually the entire eastern area of Europe is between 130 and 190. Of the EU15 countries, only Finland, Ireland and the UK have alcohol prices that would put them in this range (Sweden being just below it).

Box 9.5: Tax and price

- There is a large range in tax rates across Europe, especially for wine where nearly $\frac{1}{2}$ the countries have no tax
- Purchasing-power adjusted taxes are highest in northern Europe, and lowest in southern and parts of central Europe
- Four countries have introduced special taxes on alcopops, which seem to have reduced alcopop consumption

As these prices refer only to alcoholic drinks bought in shops, the price paid by consumers in each country will also be affected by the extent to which alcohol is consumed in on-premises (e.g. bars, restaurants) rather than off-

premises (e.g. wine shops). This means that the price paid by people in the UK and Ireland is likely to be higher than that paid in Italy, for example, given that a much greater amount of consumption occurs in on-premises in these countries (see Chapter 4).

Targeted taxes – the case of alcopops

Special taxes have been introduced in France, Switzerland, Germany and Denmark in response to an increase in young people's drinking of alcopops (see Chapter 4). For example, the tax in Switzerland was changed in February 2004 to be three times

that of the spirits rate, while in Germany an extra €0.83 per 275ml bottle was charged from July 2004. One part of the definition of an 'alcopop' is often the level of sugar – in Switzerland's case the cut-off point is 50g per litre – and this has led to low-sugar versions being produced to avoid the tax. No academic study has evaluated these particular taxes (although see Chapter 7 for the effect of tax and price in other contexts). Nevertheless, official figures show that the introduction of the tax was followed by a sharp drop in alcopop imports in Switzerland (see Figure 9.7).

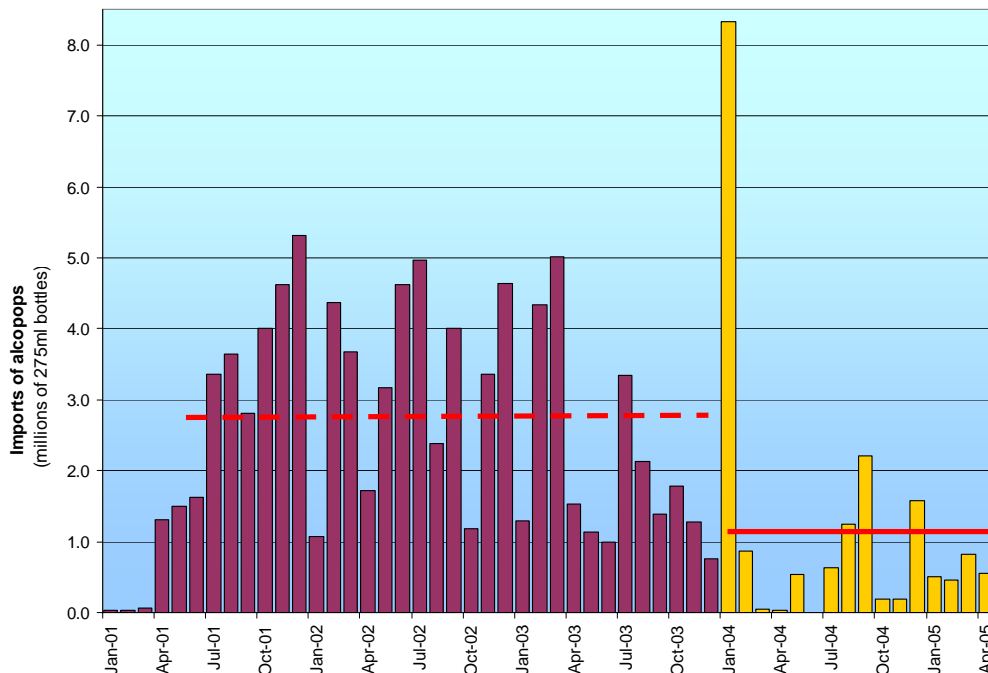


Figure 9.7 The alcopops tax in Switzerland

Official figures (Eidgenössische Alkoholverwaltung [Swiss Alcohol Board] 2005). January 2004 experienced very high imports as retailers collected stock before the tax came into effect in February. Even treating this as post-tax stock, the average Apr 2001 to Dec 2003 (dashed red line) is more than double the average since (solid red line).

The most thorough review of a tax on alcopops comes from the German government, which recently reviewed the alcopop tax introduced the previous year (Bundesministerium der Finanzen [Federal Ministry of Finance] 2005). Based on a survey among 12-17 year olds, this found the consumption of spirits-based alcopops dropped by half between 2004 and 2005 (Bundeszentrale für gesundheitliche Aufklärung [BZgA] 2005), and occurred without a noticeable substitution of other drinks (although there were slight increases in consumption of beer-based alcopops). Official records of sales of spirits-based alcopops also show a decline of 75% following the tax.

The review attributes this fall in consumption primarily to the effects of the tax, citing in particular the 70% of teenagers who reported buying fewer alcopops, among whom the main reason (63%) for buying less was that they had become too expensive (Bundeszentrale für gesundheitliche Aufklärung [BZgA] 2005). Increased awareness and enforcement around young people and alcohol may also have played some part. Market research firms also attribute declining alcopop consumption to the

taxes in Germany and Switzerland, with AC Nielsen reporting that “a massive increase in the price of FABs [in Switzerland] aimed at preventing alcohol misuse by young people led to a sharp decline in sales” (World Drinks Report, 26 May 2005). Similarly, the German association of spirits manufacturers and importers *BSI* has found that the fall in sales of spirit-based alcopops are “the direct result of a new tax on the products” (World Drinks Report, 23 June 2005).

A targeted tax on alcopops has also existed in France since 1999 (and was raised in 2005), but while there are reports that it has been effective in reducing alcopop use there has been no thorough review of its effect. Denmark introduced a tax on alcopops in June 2005, and – according to the official review of the German tax – alcopop taxes are also being considered in the Netherlands and Sweden.

COMPARING COUNTRIES

Europe and the world’s alcohol policies

In comparison to the rest of the world, the countries of Europe are less likely to have a number of policies, especially those based on market restrictions or taxation.

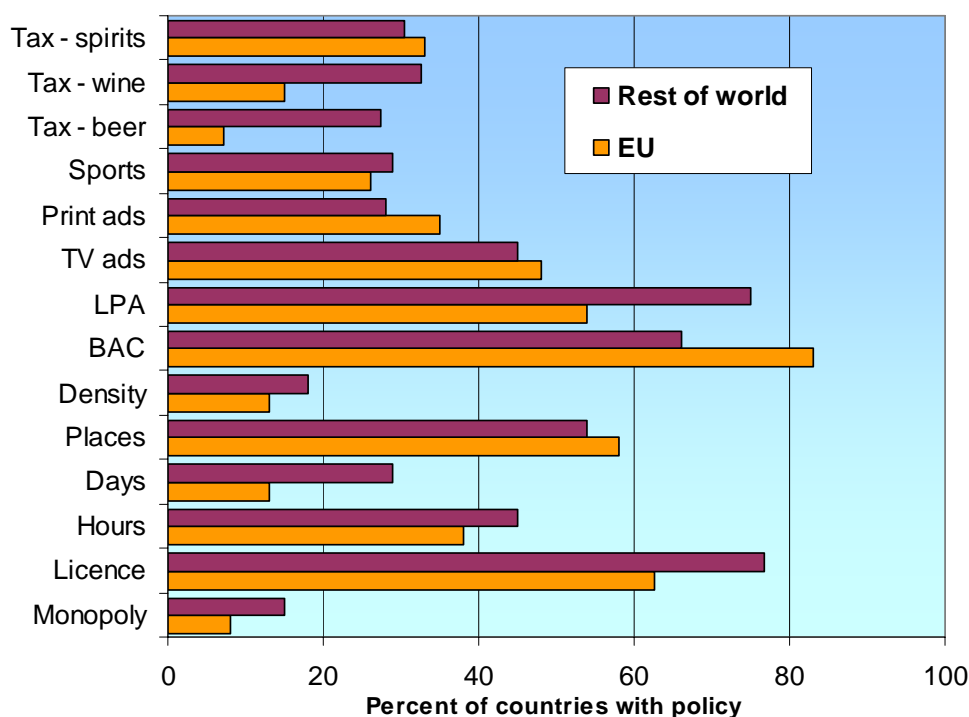


Figure 9.8 Alcohol policies in the EU compared to the rest of the world. **Source:** Data from the Global Status Report on Alcohol Policy (WHO 2004), updated by the Alcohol Policy Network. **Tax** (%WHO ‘high’ tax band (> 30% of retail price for beer and wine; > 50% for spirits)); **Sports / Ads** (% legal restrictions for beer ads / sponsorship of sports events); **LPA** (% on-premise legal purchase age (LPA) of 18+ for beer); **BAC** (% maximum blood alcohol concentration (BAC) of <=0.5g/L); **Density, Places, Days and Hours** (%off-premise restriction for any beverage); **Licence/Monopoly** (%monopoly/licence for retail sales of beer).

Looking at Figure 9.8, it is clear that fewer EU countries have (i) high taxes on wine and beer (as a % of price), (ii) restrictions on the days and hours in which shops can sell beer, (iii) a minimum age to buy beer of 18, or (iv) a licence or monopoly for the retail sale of beer. Conversely, EU countries are more likely to have restrictions on alcohol adverts in print media, and to have a maximum permitted blood alcohol limit of 0.5g/L or less for drivers.

Many of these areas cannot be summarized simply in figures like Figure 9.8, though, because of one more general trend – that the EU countries are more likely to have a policy in each area than the rest of the world, but that they are less likely to have more severe policies. For example, EU countries were *more* likely to have a

minimum age at which people can buy alcohol, but they were *less* likely to have a minimum age of 18 (in fact, the minimum age of 16 is almost unique to Europe). Similarly, EU countries were more likely to have a policy on sports sponsorship, but this was often a voluntary ban and legal restrictions were less common.



An alcohol policy scale for Europe

Going beyond the detail of individual alcohol policies to see the wider picture is more difficult than it may seem, as there is no ‘objective’ way of turning policies into a single measure.

Any way of aggregating the policies will necessarily be selective, and will also omit all elements where there is no good data (e.g. levels of enforcement). Bearing this in mind, it was decided to use the scale from a major Commission-funded project, the ECAS study (Karlsson and Österberg 2001), which itself builds on two earlier proposals (Davies

Figure 9.9 A scale of alcohol policy across the countries of Europe. Slovak Republic and Turkey have an estimated value (using EU average) for one policy area. Source: authors’ calculations using the ECAS scale (Karlsson and Österberg 2001), and data from the Global Status Report on Alcohol Policy (WHO 2004), updated by members of the Alcohol Policy Network (see Chapter 1).

and Walsh 1983; Österberg and Karlsson 2002).¹³ This not only avoids the

¹³ Due to varying data availability the scale in fact differs slightly from the ECAS scale, though the weighting is identical. The main differences are (i) for all questions, policies on each beverage type count for 1/3 of the total points (pts) available (e.g. a sales licence for spirits only is 1/3 pt); (ii) production & wholesale controls are replaced by corresponding data for production alone; (iii) the 1pt originally available for each of ‘sales/days/hours’ and ‘other restrictions’ for each of on- and off-sales has been replaced by 1pt for each of sales, days, hours and density restrictions for off-sales only; (iv) alcohol advertising restrictions were split up into 1pt for TV adverts and 1/2pt each for billboards and print advertising; (v) the 1pt for ‘national education programme or agency’ has been replaced by 1/2pt each for moderately developed education & mass-media campaigns. For most countries the scores are very

contentious process of creating a new scale, but also allows a comparison of present-day policies with those from over half a century ago.

Based on this scale from 0 (no restrictions) to 20 (all restrictions), countries in Europe varied from 5.5 (Greece) to 17.7 (Norway) giving an unweighted average of 10.5 (10.1 in the EU), Figure 9.9. All of the lowest values (below 8) lie in southern Europe (Portugal, Greece, Malta) and a cluster within central and eastern Europe (Austria, Czech Republic, Germany, Luxembourg). Although all values above 15 came from the northern European countries, the policy scores did not simply decrease from North to South, as shown by a high value in France compared to a relatively low value in the UK.¹⁴ Alcohol policy in the EU10 is variable, with some countries (such as Poland and Lithuania) having strict controls and others (the Czech Republic in particular) being much less restrictive.

When these are compared to the average taxation levels (see Figure 9.5 above), we find that most countries with high policy scores also have high taxation levels. However, there are exceptions in both directions – France has a high policy score but a low tax level, in contrast to the UK (and to a lesser extent Ireland) where high alcohol taxes coexist with low policy scores.

Trends in alcohol policy

The changing nature of alcohol policy within Europe is visible from the ECAS historical analysis for the EU15 and Norway, which goes from 1950 to the updated results of the policy scales above (2005).¹⁵ Unfortunately the necessary historical data for the non-ECAS countries in the EU10 are not available – although one earlier comparative study using a different scale found that the policy level in Poland decreased between 1981 and 1991 (Contel 1993).

Some indication of recent policy trends in the EU10 is nevertheless available from historical sources. The most important policy measure for the former-Soviet or Warsaw Pact countries¹⁶ is the anti-alcohol campaign under Gorbachev, where the state severely restricted the availability of alcohol in the late 1980s (Room 2001; Swiatkiewicz and Moskalewicz 2003). Aside from the noticeable effects on public health (see Chapter 6), the mismatch between supply and demand led to a number of more negative side effects, including alcohol rationing and a thriving black market. While the policy itself was abandoned by 1989, it has been suggested that the effects may still be discernible as a lingering resentment against one of the last acts of a centralised bureaucracy (Room 2001). Nevertheless, this does not appear to be true for everyone, with few in the elite groups of the countries bordering the Baltic Sea mentioning the Gorbachev campaign in their discussions on the place of alcohol policy in the late 1990s (Simpura *et al.* 1999).

closely related, although differences of two points or more are found in Belgium (lower), Denmark (higher), Italy (lower), and the UK (lower).

¹⁴ The UK's score is lower here than the original ECAS study due to a combination of data corrections and the adjustments made for sales controls.

¹⁵ The revisions made to the ECAS policy scale due to data availability have the result that the 2005 figures here are lower for both distribution controls and control of marketing compared to the 2000 results. However, the updated scores do not change any of the discussion and are therefore included in the graphs to avoid confusing discrepancies between graphs within this chapter.

¹⁶ All of the EU10 except Cyprus, Malta and Slovenia, plus the other study countries of Bulgaria and Romania.

Trends in the ECAS countries

In the immediate post second world war period there was a large contrast within western Europe on alcohol policy. At one end of the spectrum there was Norway, Sweden and Finland, where physical availability of alcohol was tightly controlled through monopolies, rationing and many other forms. In contrast, alcohol policy barely existed in southern Europe and even where it did it was for trade rather than health purposes (other than in Italy). Countries in-between on the policy scale concentrated mainly on licensing restrictions, but there was still a large gap between the fourth most strict country (the UK on 8) and the third (Finland on 17; see Figure 9.10).

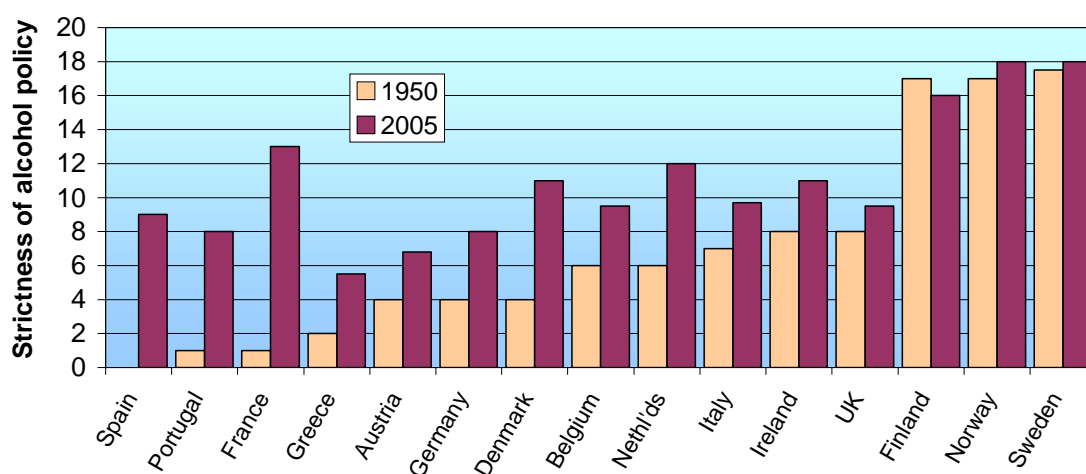


Figure 9.10 Changes in the strictness of alcohol policy in ECAS. *Source: authors' calculations using the ECAS scale (Karlsson and Österberg 2001), and data from the Global Status Report on Alcohol Policy (WHO 2004), updated by members of the Alcohol Policy Network (see Chapter 1).*

By the end of the century a degree of harmonisation was visible. Nearly all countries increased the strength of their alcohol control policies and justified them through health or social aims, with France and Spain seeing the biggest increases. The only exception was Finland (Norway and Sweden also reduced slightly in the original ECAS scale), where much of the monopolies had been abandoned and some other restrictions relaxed. In fact, other countries also avoided these policy areas (the average score for production and distribution controls actually went down 1950-2005, and the limited data also suggests declining tax rates since the 1970s (Österberg 2005)), instead opting for drink-driving and advertising controls as well as setting up prevention or education institutions. The convergence, therefore, not only relates to the blunt score, but also to changing preferences away from 'supply' and towards 'demand' management (see Figure 9.11).

Part of the more recent period is also covered by a WHO-EURO report for the 2001 Stockholm Ministerial conference (Rehn, Room, and Edwards 2001). This found that advertising and point-of sale promotions were the most common areas for policy change 1994/5 to 1998/9, with, in both cases, the trend being for stricter controls (9 of 16 for advertising, 11 of 13 for point-of-sale promotions). Drink-driving policies were also strengthened, particularly blood alcohol limits (in 9 cases decreased and

only once raised, in Bulgaria) but also the introduction of random breath testing (in 5 countries). Only in the area of the availability of alcohol were policies weakened, with monopolies being replaced by licensing in five countries and licensing controls weakened in five other countries (although in four separate cases licensing restrictions were strengthened). This fits with the results from ECAS, where advertising and targeted restrictions became stronger at the same time as availability controls weakened.

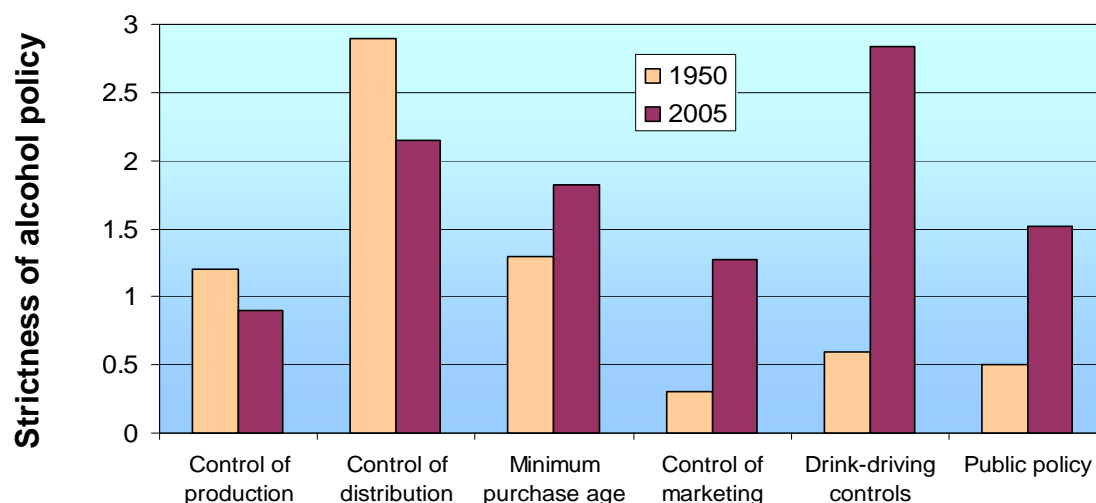


Figure 9.11 Changes in the strictness of different alcohol policy areas in ECAS. *Source: authors' calculations using the ECAS scale (Karlsson and Österberg 2001), and data from the Global Status Report on Alcohol Policy (WHO 2004), updated by members of the Alcohol Policy Network (see Chapter 1).*

CONCLUSION

Alcohol policy in Europe shows some striking similarities between countries – but also a number of continuing differences. For example, while all European countries have a set of policies relating to alcohol, sometimes these are uncoordinated and lacking an overarching strategy. Areas where the countries are relatively similar include blood alcohol limits for drivers, licences for alcohol sales, the existence of a minimum age at which alcohol can be purchased in bars, and some form of alcohol education in schools. In contrast, wide differences can be seen in the enforcement of drink-driving regulations (where large numbers in several countries believe they will never be breathalysed), the exact age at which young people can buy alcohol (particularly in shops), limits on availability, and advertising restrictions. Most of all, the tax rates in different European countries show an enormous variation, with the lowest rates found in southern and parts of central and eastern Europe. Despite this, it should be noted that there is not a simple north-south gradient in the strictness of alcohol policy, as seen by the high score in France and relatively low policy scores in Ireland and the UK.

The analysis and comparison of country-based policies inevitably highlights the gaps in national action – the policies that are more common outside of Europe than within it, the policies that were more common in the past than they are now. Controls on the availability of alcohol have declined over the second half of the 20th century, which some have argued is associated with the growth of consumerism (Lund,

Alavaikko, and Österberg 2000), although the evidence on changing opinions in this particular area does not confirm this of itself (Österberg and Karlsson 2002). Tax levels compared to alcohol prices are also lower in Europe than the rest of the world, a finding that must also be put in the context of the internal market policies discussed in Chapter 8. And while many effective policies to reduce harm (see Chapter 7) are widespread in the EU today, there remain many situations where alcohol-related harm could be clearly reduced through the widespread implementation of policies that are adopted in the majority of the EU Member States (these are reflected in the recommendations in Chapter 10).

However, it is equally important to highlight the positive trend of alcohol policy in Europe overall. Drink-driving controls in particular are now commonplace, in contrast to their relative rarity 50 years ago. To a lesser extent, a number of other policies have also diffused widely within Europe including marketing controls, minimum ages to buy alcohol, and public policy structures to deliver alcohol policy – all of which are possibly partially related to public attitudes to alcohol policy, although more research is needed in this area. And on a collective level, EU Member States are considerably closer in their alcohol policies than they were half a century ago, paralleling the harmonization in drinking levels discussed in Chapter 4. It is within this trend of improvement that the gaps should be seen, and worked upon in a positive light.

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