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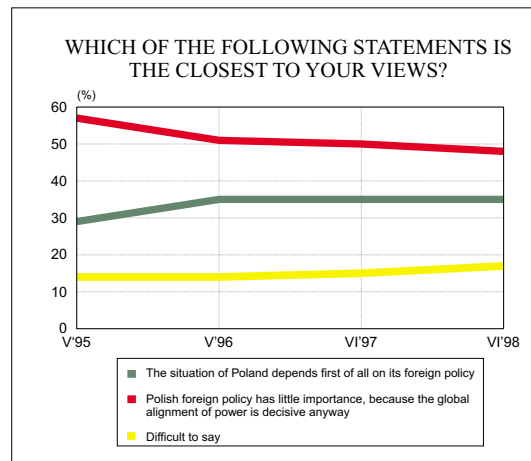
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VIEWS ON THE INTERNATIONAL SITUATION OF POLAND

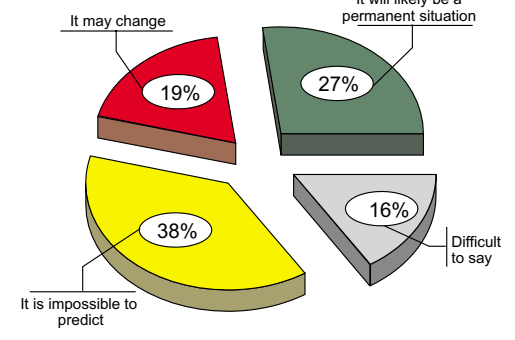


world will return to the bi-polar alignment of power.

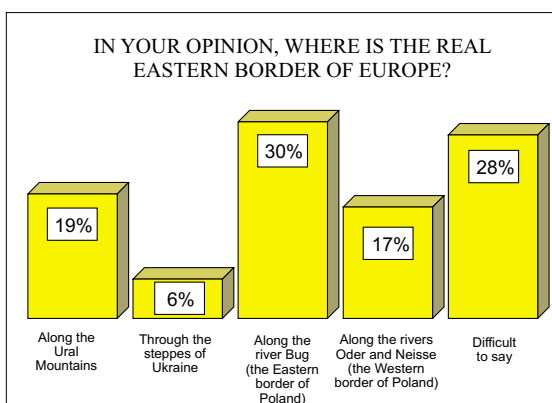
A majority of respondents believe that Poland has little chance of maintaining a fully independent position on the global scene. However, over the last two years we have observed a systematic, though slight, decrease of pessimism in the assessment of the chances of Poland on the international political scene. It is not accompanied by a corresponding increase of optimism, though.

Our history shows that the fact that Poland is a part of Western culture is not enough to actually belong to the West. Great plans and political hopes of our leaders were often ruined by geopolitical changes we had very little influence on, and our citizens' feeling of stabilization turned out to be nothing more than a delusion. We asked our respondents about how stable (in their opinion) the present geopolitical situation is and whether our reunion with the West is a permanent trend or, to the contrary, it can be reversed in the foreseeable future. More than a quarter of respondents are convinced that the present situation is permanent, compared to approximately 20% of those who are skeptical. The largest part of respondents are unable to make a projection. It seems therefore that the majority of Poles regard our political situation on the international scene as to a large extent uncertain.

IN YOUR OPINION, WILL THE UNION OF POLAND WITH THE WEST BE PERMANENT, OR DO YOU THINK THAT THIS SITUATION MIGHT CHANGE IN THE FORESEEABLE FUTURE?



Since 1994, when we asked our respondents about their perception of "the borders of Europe", Poland has become significantly closer to the West in the area of politics.



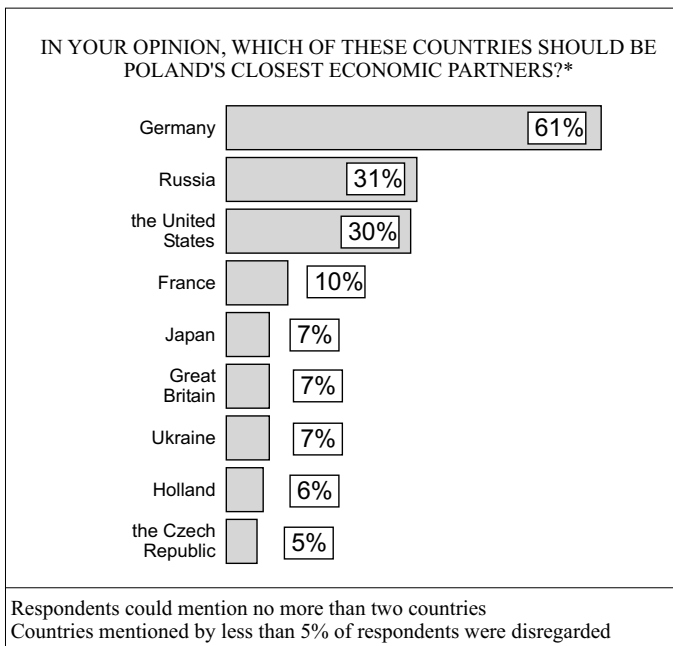
Poland's entry into the European Union is already the subject of specific negotiations and our membership in the Western military alliance is almost certain. However, the social perception of "the borders of Europe" has remained almost unchanged. Our Western border is still regarded as the "Eastern border of Europe" by one in six respondents.

More information on this subject can be found in the CBOS report "Poland in the changing world", August '98.

WHO WE WOULD LIKE TO GO WITH - THE PREFERRED PARTNERS AND ALLIES OF POLAND

The collapse of the international system which originated at the conference in Yalta gave Poland the possibility of shaping its own independent foreign policy. On the threshold of the twenty-first century, Poland started defining the directions of its co-operation with other countries. The main direction of this cooperation is clear for the majority of Poles, who support our country's membership in NATO and the European Union. The support for overall Western orientation does not, however, determine the priorities as far as bilateral relations are concerned. What are the social expectations in respect to Polish foreign policy in this area?

As far as economic relations are concerned, Germany is regarded as the most desired partner of Poland. Next come the United States and Russia (although the number of indications is significantly smaller) which outdistance the remaining countries.

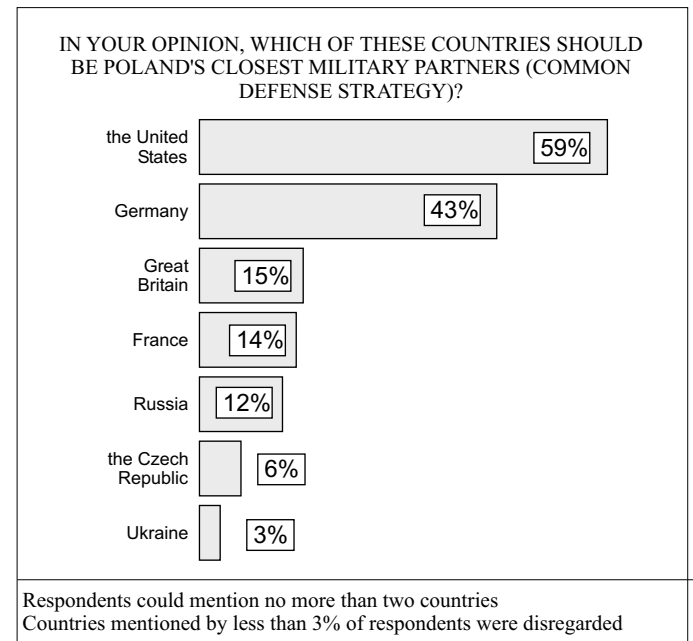


In the last two years there have been no significant changes in the way the attractiveness of particular countries as our economic partners is perceived, apart from one important exception. Now more persons opt for a closer cooperation with Russia than a year ago. On the other hand, the United States is now seen as the most desired economic partner less frequently than before. The change of Russia's position with regard to Poland's membership in NATO and the EU might have had an effect on the change of the Poles' attitude towards this country. The previous resistance of Russia to our aspirations was interpreted as its intention to re-build its former sphere of influence, which could have made the respondents' attitude to this country more reserved. Now our distrust of Russia is less and less motivated by this fear, so this neighboring country with a great potential and absorbent market is becoming an

increasingly desired business partner. Similarly, the relatively high position of Ukraine on the list of preferred economic partners most probably results from its proximity and a conviction that it is an attractive market.

As far as political cooperation is concerned, the United States (55%) and Germany (52%) are invariably perceived by respondents as the most desired partners. However, the respondents' views on this matter have evolved slightly since 1996. Although the number of respondents who support close cooperation with Germany is more or less stable, the number of those who opt for close cooperation with the United States is growing.

On the other hand, the number of persons who believe that Russia should be one of Poland's most important political partners is decreasing year by year. At the moment only 22% of respondents share this opinion, compared to almost one third two years ago (30%). As far as the rest of our neighbors are concerned, the Czech Republic and Ukraine are mentioned by significant, though small groups of respondents (5% and 3%, respectively).



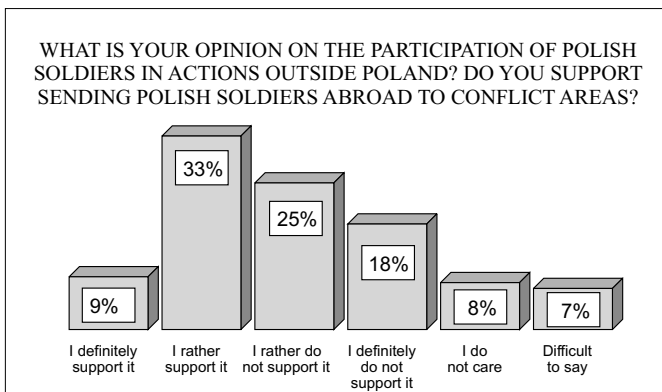
More information on this subject can be found in the CBOS report "Directions of our cooperation with other countries", July '98

ACCEPTANCE OF THE PARTICIPATION OF POLISH SOLDIERS IN INTERNATIONAL MISSIONS ABROAD

The belief that our entry into NATO is the best way of ensuring the safety of our country has prevailed in Poland for a few years now. If a referendum took place, the vast majority of respondents would opt for our membership. However, the direct participation of Polish troops in military interventions abroad has not won wide social support as yet, especially if such an intervention could involve the participation of Polish soldiers in

military operations. In June 1993, less than one third of respondents supported the possible participation of Poles in military intervention in former Yugoslavia. Two years after (in June 1995), a considerable majority of respondents accepted the involvement of international organisations in solving the Balkan conflict, but at the same time only 35% of them supported the possible participation of Polish soldiers in military operations in Bosnia.

Now, in view of the growing conflict in Kosovo and the possible involvement of international mediation forces under NATO command, Poles' opinions on the participation of Polish soldiers in interventions abroad are divided: the percentage of respondents who oppose the sending of Polish soldiers abroad to conflict areas is similar to the percentage of those supporting our participation in such actions. However, the opponents are

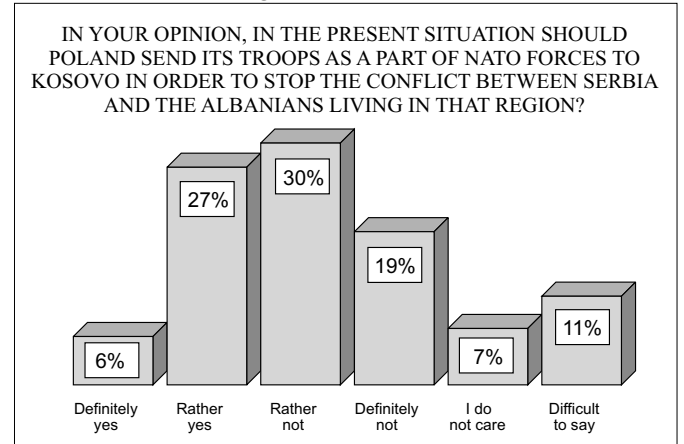


As in the past, men support the participation of Polish soldiers in such operations more frequently (51%) than women (33%). Also, younger respondents and inhabitants of large cities more frequently support such actions. However, the relation between this issue and the level of education of respondents is the most important: the more educated they are, the more frequent is their support for the participation of our soldiers in such missions (26% of supporters among respondents with primary education compared to 66% among those with higher education). These differences seem to follow from the respondents' interest in politics, which in turn is usually connected with some knowledge on the nature and importance of such international interventions. The analysis of our data indicates that the greater their declared interest in politics, the more frequently respondents support sending Polish soldiers abroad and the less frequently they declare their indifference, opposition or lack of opinion.

A vast majority of those respondents who support sending Polish troops abroad to conflict areas believe that only volunteers should be sent (86%) and not soldiers designated by their superiors (13%).

The overall support for the participation of our soldiers in such missions may not, however, mean the support for the involvement of our troops in a particular conflict. The opposition of some respondents to Polish involvement in military operations abroad is more decisive in the case of the Kosovo conflict. Almost half of respondents would oppose the participation of our soldiers in a military intervention in Kosovo, compared to only one third of those who would support the

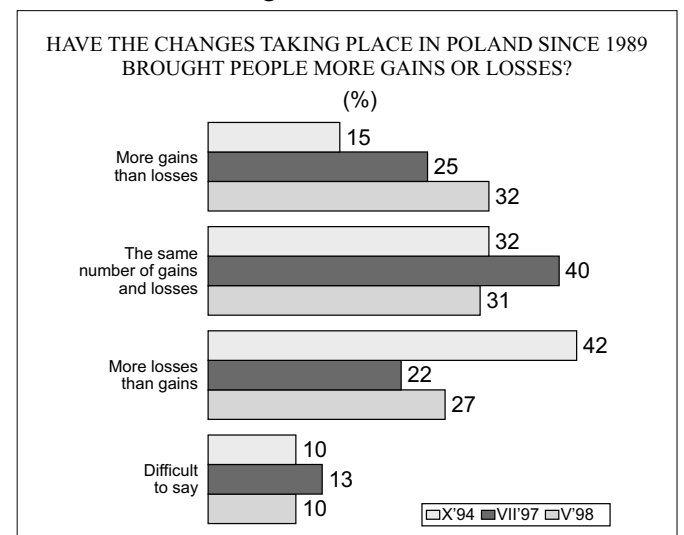
involvement of our soldiers as a part of NATO forces. On the other hand, it is possible that such a low level of support in this particular case to some extent results from the government statement that Poland is not going to send troops to Kosovo even if NATO decided to start military intervention in this region.



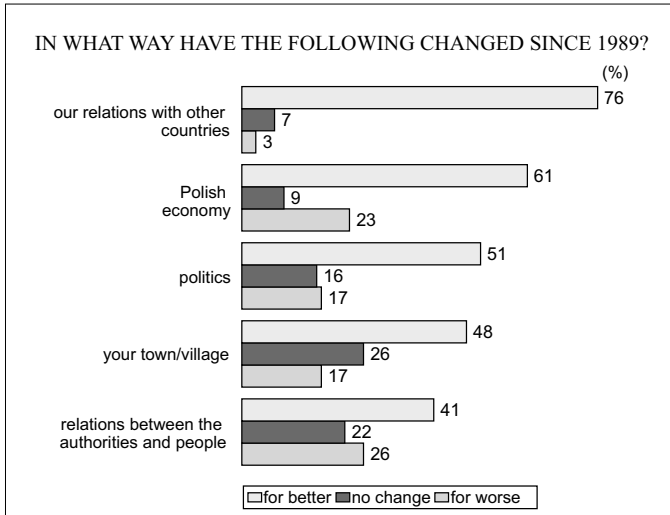
More information on this subject can be found in the CBOS report "The participation of Polish soldiers in international missions abroad", July '98.

WHEN WAS LIFE BETTER: IN THE PRL (THE COMMUNIST POLAND) OR NOW?

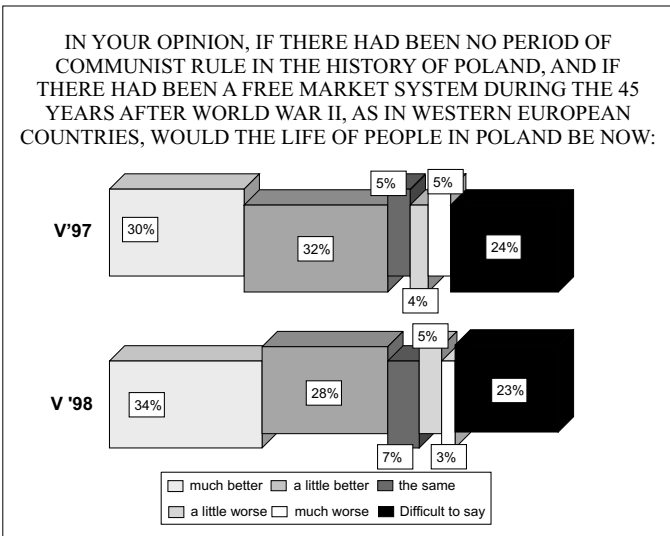
According to our surveys, the part of the society which experiences positive results of the reforms initiated in the early 1990s has been growing in recent years. The percentage of respondents who notice more advantages of living in contemporary Poland than in the PRL is increasing. In 1994 the opinions that PRL was a better country to live for respondents and their families prevailed, but since 1996 the number of respondents who notice more advantages of living in contemporary Poland is slightly greater than the number of those who believe that their life was better before 1989. On the other hand, the group of persons dissatisfied with their present quality of life is still rather large.



As compared to the PRL, respondents notice changes for the better mainly in the area of foreign policy. Over three quarters of respondents believe that our relations with other countries have improved since 1989. Almost two thirds of respondents express a positive opinion on the changes which have taken place in our economy in the same period. Over half of those polled evaluate the political changes as positive. The changes in the relations between the authorities and people were evaluated relatively the lowest.



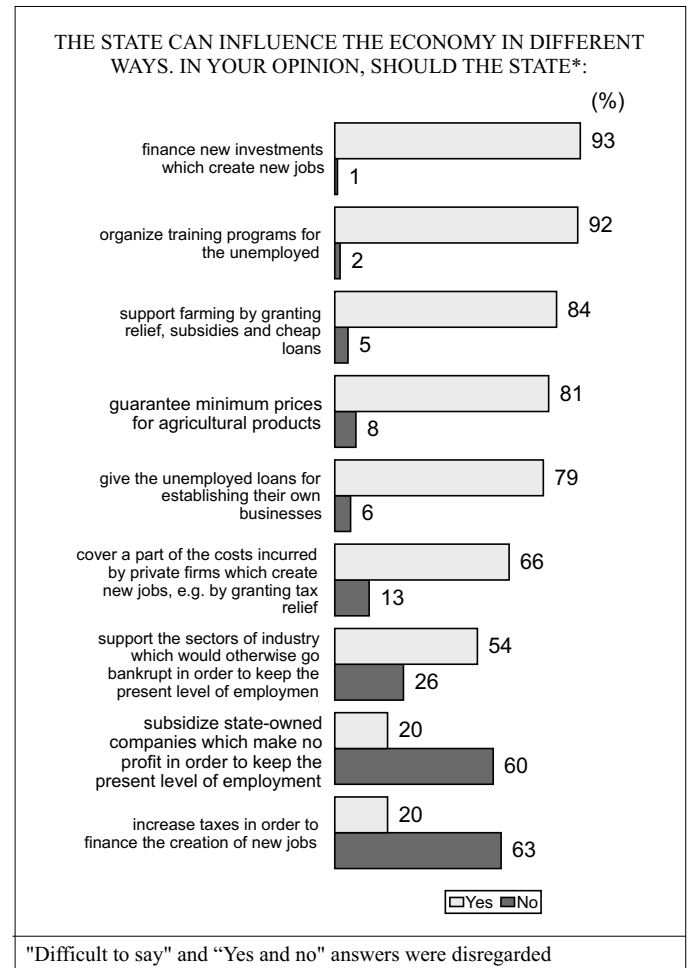
People who have good memories of the PRL often point to the achievements of Poland in that period by comparing the situation in the PRL to the situation in pre-war Poland. Such opinions, which, by the way, quite often appeared in the communist propaganda, are usually misleading, because they do not take into account the lost opportunity, i.e. the post-war development of the free market democracies whose level of development before World War II was comparable to Poland. We asked our respondents what (in their opinion) would the situation of people in Poland look like now if there had been no period of communist rule in our history. According to a vast majority of respondents, most Poles, including themselves and their families, would have a better life.



More information on this subject can be found in the CBOS report "The opinions on the transformation since 1989", July '98.

HOW MUCH STATE INTERVENTION IN THE ECONOMY?

Years of central planning are to blame for the fact that even now, a long time after the collapse of communism, a lot of Poles regard the state intervention in the economy as a self-evident good. Moreover, attempts at restricting the role of the state in our economy are often seen as the state renegeing on its most important responsibilities. Poles' attachment to state interventionism appears to be very strong, although some changes can be noticed over the last few years. Fewer persons believe that subsidizing unprofitable enterprises or sectors of industry can be a remedy for unemployment. Respondents mention other solutions to this problem, such as supporting the creation of new jobs by the state and helping the unemployed change their qualifications or start a business.

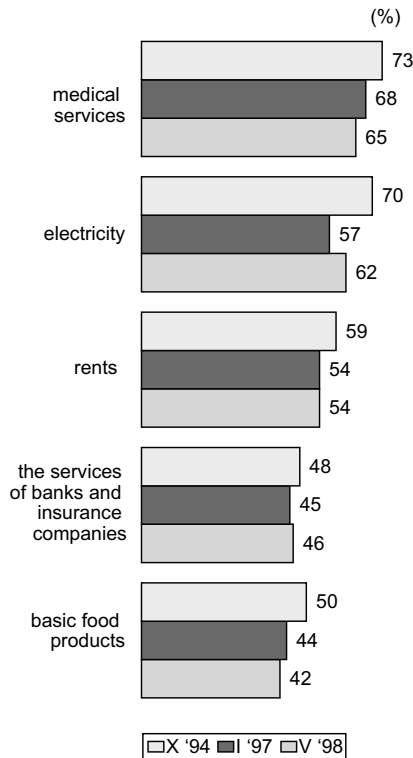


*"Difficult to say" and "Yes and no" answers were disregarded

Although the number of respondents who believe that the prices of basic services or goods should be determined by the state rather than the market is falling as compared to 1994, at least half of respondents still think that prices in such areas as the health service, the power industry and housing (rents) should be determined by the state rather than market forces or the actual cost. The support for state intervention in the prices of medical services and electricity is particularly strong.

SHOULD THE PRICES OF ... BE DETERMINED BY THE STATE OR BY THE FREE MARKET?

(The percentage of respondents indicating the state)



In the respondents' opinion, the following sectors require particular support: farming, health service and housing development - over three quarters of Poles see the need for subsidizing the health service (85%) and supporting housing development (75%), almost two thirds believe that the state should also subsidize the production of electricity (63%). The conviction that the state should support farming (by means of relief, subsidies and cheap loans, as well as guaranteed minimum prices) and subsidize health service and housing development prevails in all socio-occupational groups, including those which are the most in favor of a limitation of state interventionism.

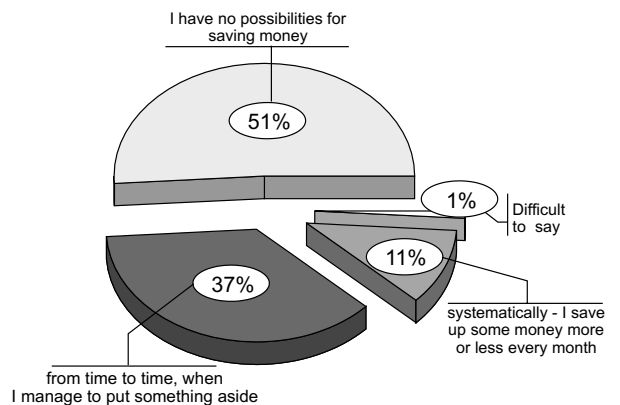
Undoubtedly, the attitude to state interventionism is one of the factors closely related to the overall evaluation of the communist Poland (PRL) as a "welfare state", as well as the opinion on both the previous and the current political and economic system. Persons who are more in favor of state interventionism (support subsidizing unprofitable factories and industry sectors in order to fight unemployment, opt for the protection of Polish farming, the state control of the prices of basic goods and services, and subsidizing some sectors of the economy) at the same time believe that the PRL was a better place to live than the present Poland. They also more frequently believe that the communist system did more good than harm to people in Poland. Moreover, in their opinion the recent economic transformation did more harm than good..

More information on this subject can be found in the CBOS report

THE POLISH SURVIVAL SCHOOL - INDIVIDUAL STRATEGIES OF IMPROVING PEOPLE'S MATERIAL SITUATION

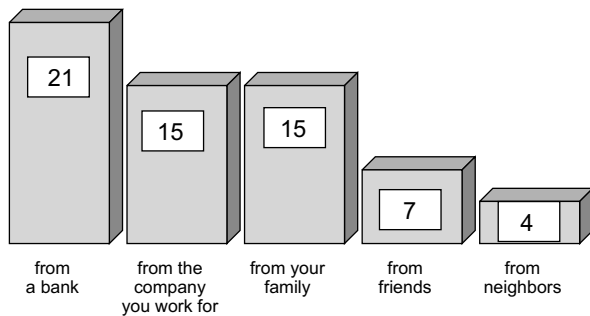
The most common method of adapting to a difficult material situation is restricting individual needs and so-called belt-tightening. Almost four fifths of respondents (78%) declare that if they have financial problems, they limit their expenses and save. The second most frequent strategy in a difficult financial situation is doing more work - over two fifths of respondents (41%) declare that they work more intensively in order to improve their standard of living, while 29% take extra jobs. Another method, used by one third of Poles, is borrowing money. This strategy is the most common among the poorest, for whom borrowing money is often the last resource, but it is also used by well-off persons who multiply their fortune in this way. One third of respondents (31%) try to improve their situation by turning to their family, relatives or friends for help. Apart from students, who are usually supported by their parents, these are persons whose material situation is difficult. Respondents whose situation is even worse, mention using social benefits and social aid (7%) as a way of coping with bad living conditions, or even selling their belongings to make ends meet (5%).

DO YOU GENERALLY SAVE MONEY:



The remaining strategies used by Poles to improve their standard of living can be regarded as the most active and innovative. One in five respondents takes part in additional training in order to earn more in future. One in eight adult Poles is interested in the possibilities of investing money and making profit in this way. One in twenty goes abroad to earn money. The same percentage of respondents buy assets which will hold their value (gold, jewelry, land, houses, flats). According to the respondents' declarations, the least common method of improving individual material situation is renting out premises (3%). It seems, however, that respondents might conceal this kind of business, as a large part of it belongs to the "grey sphere".

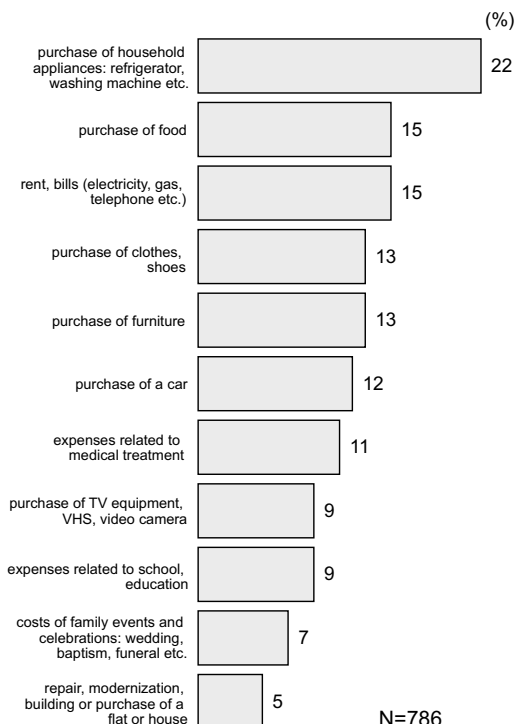
HAVE YOU TAKEN A LOAN OR BORROWED MONEY DURING THE LAST 6 MONTHS? HAVE YOU BORROWED MONEY:
(percentage of positive answers)



From January to June 1998

Limiting expenses, which is the most common way of improving individual material situation of Poles, has very little in common with intentional saving, i.e. putting aside a certain amount of money systematically. Only one in nine Poles saves up a certain amount every month, compared to half of the population who declare the impossibility of saving any money. We know from other research that in July approximately one fourth of respondents had some savings. Therefore it seems that a considerable part of those who save money from time to time often spend all the money they have saved, so they have savings at their disposal for a short time only.

WHAT DID YOU USE THE BORROWED MONEY (LOAN) FOR, OR WHAT DID YOU BUY IN THE INSTALLMENT SYSTEM?



The possibility of saving money very strongly depends on the social position of a respondent - it is related to his/her education, socio-occupational position and the level of income. A particularly strong differentiation of chances in this respect can be observed as far as systematic saving is concerned. One fourth of managers and self-employed persons (excluding farmers)

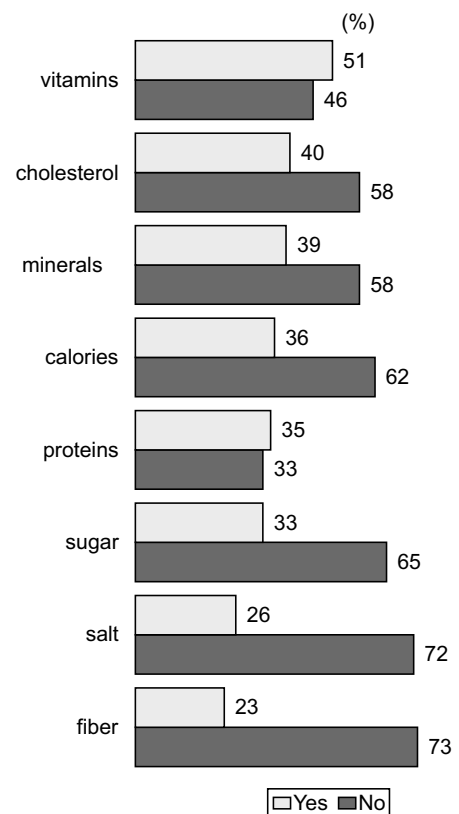
save money systematically, while among unskilled workers and farmers this percentage drops to 3% and 1%, respectively. It should be noted that saving is closely related to the most active and innovative strategies of coping with financial problems, such as taking part in additional training, investing money, buying valuable goods and working abroad. It is much less strongly related to the other models of coping with financial problems identified in our survey, i.e. working more intensively or taking extra jobs, limiting expenses and taking loans.

More information on this subject can be found in the CBOS report "Poles' methods of improving their individual material situation", July '98.

ABOUT HEALTHY NUTRITION AND VITAMINS

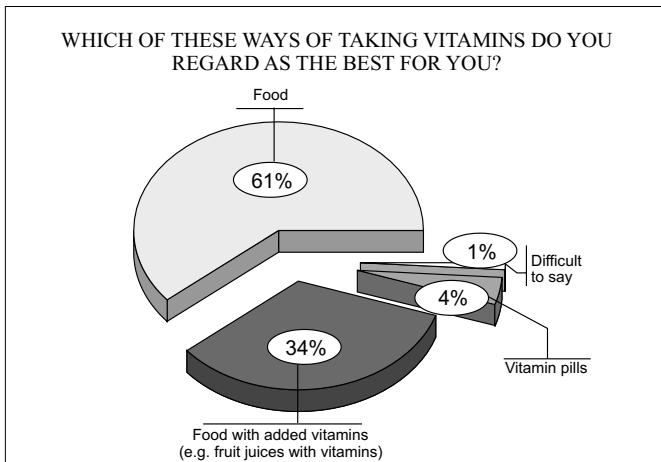
In their own opinion the majority of Poles eat healthily (75%) and their diet is rich in vitamins (67%).

WHEN YOU BUY FOOD, DO YOU PAY ATTENTION TO THE CONTENT OF:



"Difficult to say" answers were disregarded

For most respondents ordinary food is the most important source of vitamins (61%). Food products containing added vitamins are much less popular (34%). It seems that they are seen as an attractive supplement of the basic diet rather than an indispensable source of vitamins. Only one in twenty respondents regards synthetic vitamins or vitamin pills as the basic source of vitamins.

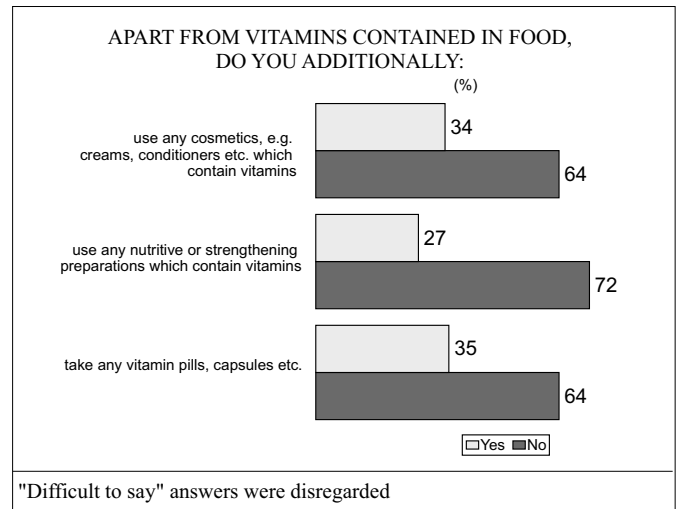


The beliefs discussed above correspond with the opinion of the largest part of respondents that in order to provide our body with the sufficient amount of vitamins it is enough to eat well. Similarly, the "artificial" reinforcement of the body by taking vitamin pills is treated with caution. One in four respondents believes that they should only be taken on a doctor's recommendation.

Various kinds of vitamin pills, vitamins and mineral supplements or food products containing vitamins have been widely available and extensively advertised for a few years now. The quality of cosmetics is also more and more often evaluated not only with regard to their price or brand, but also the content of vitamins improving the appearance of skin, hair, nails etc. Apart from eating vitamins in their natural form, do Poles pay attention to such ingredients in these kinds of products?

Over half of respondents (56%) declare that when they buy medicines available without a doctor's prescription (e.g. against a cold), they choose those which contain vitamins at least sometimes. However, taking vitamin pills on their own is not common. Slightly over one third of respondents declare taking them, but it should be noted that at least some of these persons may take vitamins as a part of a treatment recommended by a doctor. Even fewer persons declare using food products with added vitamins or special preparations strengthening the body.

The frequency of taking vitamin pills is related to certain socio-demographic characteristics of respondents. Women take them more frequently than men (42% and 28%, respectively). Inhabitants of towns do so much more frequently than those of villages. On the other hand, age is not important in this respect, with one exception - the oldest respondents take vitamin pills more frequently than the average, which is probably connected with doctor's recommendations. The relationship between the consumption of vitamins and education and the financial position of respondents is almost directly proportional. The better the education and financial situation, the higher the percentage of those who take vitamins and the lower the percentage of those who do not do it at all. As far as socio-occupational groups are concerned, managers and the intelligentsia (44%), as well as white collar workers (46%) use vitamins more frequently than the average. On the other hand, only one in ten farmers takes vitamin pills.



Cosmetics and body care products containing vitamins are obviously used by women (54%) much more frequently than men (12%). The use of cosmetics and body care products containing vitamins depends on the same socio-demographic characteristics as discussed above in relation to taking vitamin pills. In summary, we may conclude that vitamins in all three forms discussed here are taken the most frequently by women and well-off persons with higher education, usually living in towns.

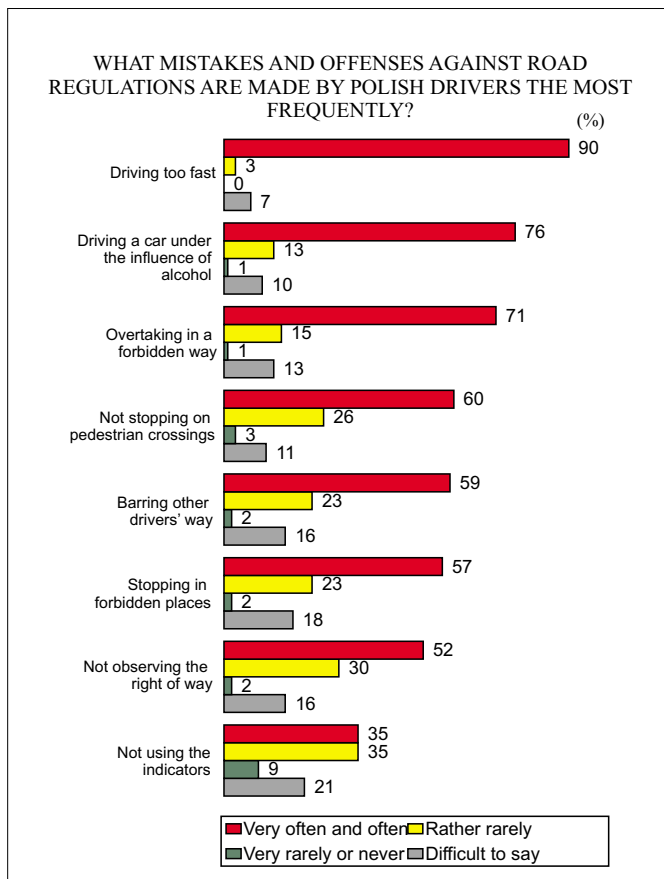
More information on this subject can be found in the CBOS report "Fashion for vitamins", July '98.

A POLE BEHIND THE WHEEL

Almost every other Pole has a driving license (46%). If the moment of obtaining this document were regarded as a measure of a driver's experience, a significant part of our drivers could be regarded as experienced. Over three quarters of them have had a driving license for over 5 years, including 63% of those who have had it for at least 10 years. Only 4% can be regarded as complete beginners. However, driving skills depend first of all on experience. The majority of car owners (61%) use their cars more or less every day (at least 4-5 days a week). On the other hand, almost one in five drives a car once a week or less frequently (the so-called Sunday drivers).

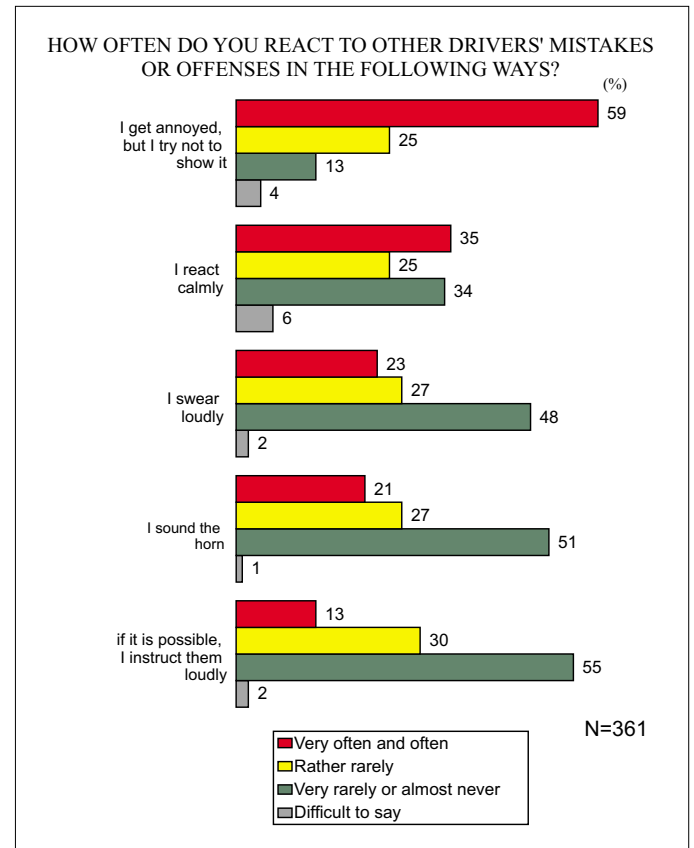
Poles do not have a high opinion of our style of driving. According to our respondents, Polish drivers are too daring. This is their cardinal sin. Speeding is regarded as a widespread habit. Similarly, driving under the influence of alcohol or overtaking in a forbidden manner are also considered very common. In the opinion of three fifths of respondents, such serious offenses as not stopping on pedestrian crossings and barring another driver's way are also frequent.

The respondents' evaluation of the Polish style of driving is dominated by negative opinions. Half of respondents evaluate the safety of driving negatively (50%) and believe that Polish drivers do not drive with proper care (49%). Only 6% give Polish drivers a positive opinion in this respect. Drivers' good manners are not regarded highly, either (39% of negative opinions and 9% of positive ones).



The reactions of drivers to breaking the road regulations and the style of driving of other drivers are a different matter. Only one in three drivers claims that he/she usually reacts calmly to other drivers' mistakes and offenses. Almost three fifths usually get annoyed, although (according to their declarations) they try not to show it. Only slightly more than half sound the horn or loudly instruct drivers who break the rules. Almost every other driver swears sometimes.

Of course, the drivers' reactions to breaking the road regulations are individual. Men admit to violent reactions behind the wheel more frequently than women: they swear and instruct other drivers more frequently. Drivers with higher education admit to sounding the horn or giving loud instructions much less frequently than others.



More information on this subject can be found in the CBOS report "A Pole behind the wheel", August '98.

In addition to the bulletins referred to above, the following have been published recently:

The Poles' attitude to the inequality of income and the role of the state in social welfare
 Poles on the World Football Championships France'98
 Polish families. The feeling of financial security and the threat of poverty
 Club discipline in the Parliament and the consequences of not observing it. The stability of cooperation between the AWS and the UW
 The perception of conflicts among different social groups
 The daily life of Poles. Problems related to the standard of living and their psychological and social consequences
 The evaluation of the rate of Polish privatization
 The position of Poland in Europe in the year 2000
 About the number of voivodships again
 Opinions on the government and political institutions
 The attitude to the trial of persons responsible for December '70
 Opinions on trade unions
 On the situation of Poland on the international scene

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