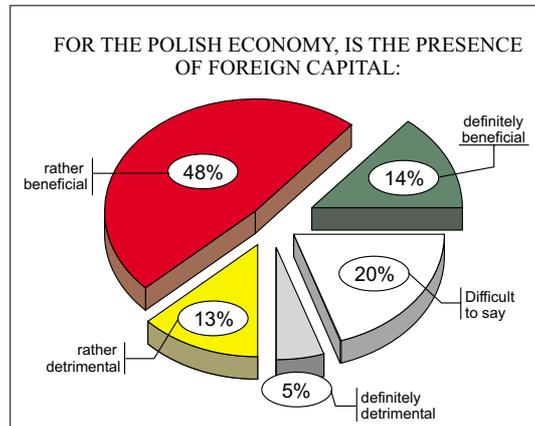


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ACCEPTANCE OF THE PRESENCE OF FOREIGN CAPITAL IN POLAND



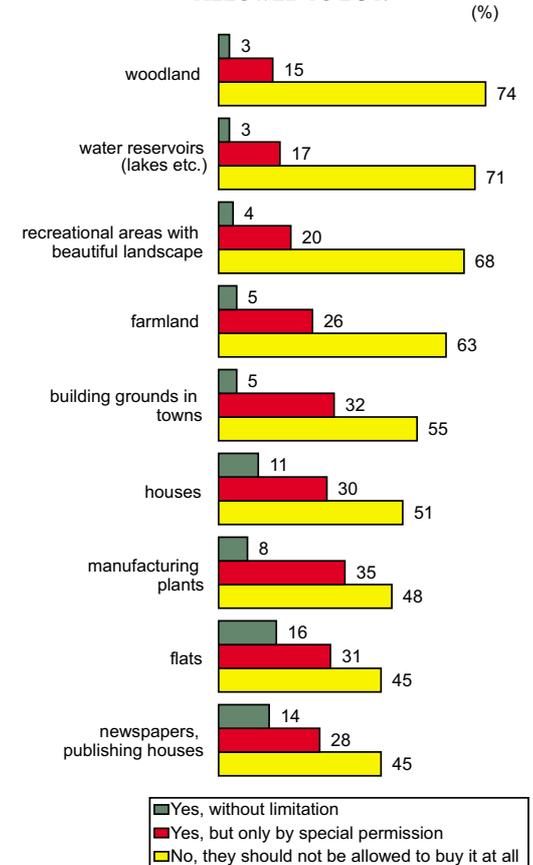
Due to the healthy condition of the Polish economy, the level of foreign investment in Poland has been growing in recent years. The growing presence of foreign capital does not arouse anxiety or fears among Poles. In their opinion, the scale of foreign investment in Poland is first of all insufficient (32% of indications - a little less than three years ago) or satisfactory (25%), with only 13% of respondents regarding it as too high. The considerable majority - almost two thirds of respondents - express a positive opinion on the presence of foreign capital in the Polish economy and regard it as beneficial. Less than one fifth of respondents share the opposite opinion (18%). These opinions have not

changed significantly during the last two years.

Despite a generally positive attitude towards foreign investment, there are clear doubts connected first of all with land ownership. Most Poles do not accept the involvement of foreign capital if it is connected with buying real estate by foreigners. The considerable majority of respondents believe that foreigners should not be allowed to buy woodland, water reservoirs and recreational areas at all. As far as farmland is considered, the opinions are a little more moderate, but the majority of Poles are against foreigners buying it as well. A few more respondents would allow foreigners to buy building plots in towns, but still over half of them are against it. Only a slightly smaller percentage of respondents are opposed to allowing foreigners to buy other types of real estate - houses, manufacturing plants, flats and newspapers or publishing houses. Only in the case of flats is the percentage of persons who accept the possibility of allowing foreigners to buy them higher than the percentage of those who express the opposite opinion. However, even those who accept such a possibility would usually impose some restrictions.

As compared to May 1996, the respondents' opinions on the question whether foreigners should be allowed to buy real estate in Poland have changed only slightly. A few less persons are against foreigners buying recreational land with a beautiful landscape, while the opinion that restrictions should be imposed on buying manufacturing plants is slightly more common.

IN YOUR OPINION, SHOULD FOREIGNERS BE ALLOWED TO BUY:



"Difficult to say" and "I don't care" answers were disregarded

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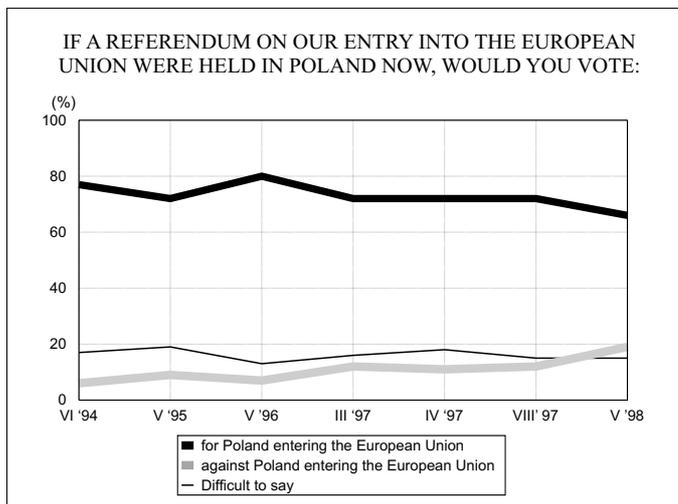
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More information on this subject can be found in the CBOS report "Acceptance of the presence of foreign capital in Poland in view of the support for integration with the European Union", June '98.

EUROSCEPTICAL DOUBTS? - CHANGES IN THE SUPPORT FOR INTEGRATION WITH THE EUROPEAN UNION

The prospect of Poland entering the European Union has met with continuous, high social support for a number of years. However, now, when this possibility is becoming real and certain steps need to be taken in connection with it, some Poles are starting to feel certain doubts or even anxiety. If a referendum on the entry of our country into the European Union were held now, two thirds of Poles would vote for it, i.e. 6% less than last August. The decrease in the number of supporters of the integration is accompanied by a significant increase in the number of its opponents (by 7%). Growing scepticism in respect to Poland's entry into the European Union is particularly visible over a longer period of time. During the last four years the number of opponents of integration increased by over three times (from 6% in June 1994 to 19% now).

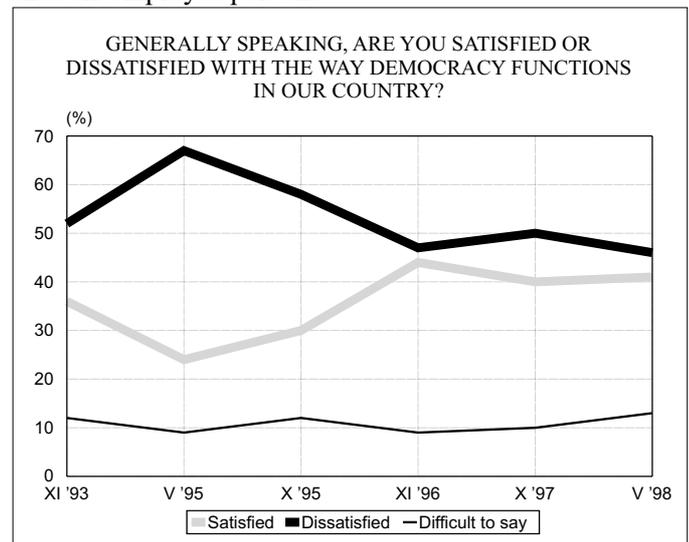


The relationship between the acceptance of integration and the social position of each respondent has not changed much. Those Poles whose social and material status is high (well-educated persons who declare a high income and evaluate their own material position as good), as well as young people - up to 24 years of age, especially students, are the most pro-European. As far as socio-occupational groups are concerned, managers, the intelligentsia and owners of private businesses express the highest, steadiest support for integration. On the other hand, a visible change in the views of farmers can be observed. Although they have always been more sceptical about integration than other social groups, their opposition to Poland's entry into the European Union has never been as strong as it is now. Their opinions on this issue have changed quite radically during the last two years, from substantial support for the integration in May 1996, when nearly three quarters of farmers opted for Poland entering the EU, to rejection of the integration by almost half of farmers (45%) now.

More information on this subject can be found in the CBOS report "Acceptance of the presence of foreign capital in Poland in view of the support for integration with the European Union", June '98.

SOCIAL OPINIONS ON DEMOCRACY

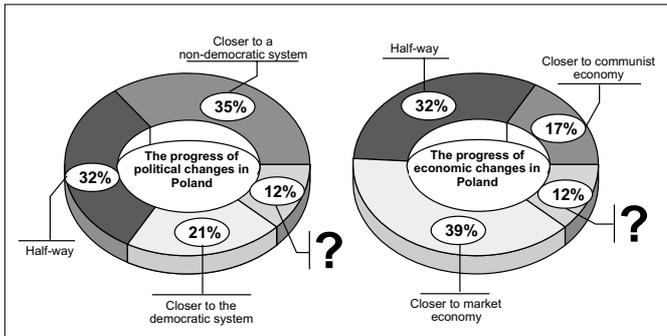
Although it has been almost ten years since Poland became a democracy, persons who declare their dissatisfaction with the functioning of this system are still found in our society. The prevalence of these opinions has become smaller over the years, but the change has been irregular and apparently dependent upon the contemporary political situation at the moment of conducting a survey. Satisfaction with the functioning of democracy, as well as regarding the democratic rule as important, is connected to: having a higher than average level of education, satisfaction of a respondent with his/her material situation, right-wing political views and support for the parties which won the latest elections, i.e. Solidarity Election Action (AWS) and the Freedom Union (UW). As far as different socio-occupational groups are concerned, the most positive opinions about our democracy are expressed by managers, the intelligentsia and self-employed persons.



The respondents' evaluations of the democratic system to a large extent depend on how they personally perceive the effects of the economic transformation which started at the same time as the political transformation. The vast majority of those who regard themselves as beneficiaries of these changes (71%) express a positive opinion on democracy, while most of the respondents who feel that they have lost as a result of these changes declare their dissatisfaction with the functioning of democracy in Poland (64%).

As far as the evaluation of the progress of democracy in Poland is concerned, most respondents believe that we are still not farther than half-way between the fully democratic system and the lack of democracy (32%), or even closer to a non-democratic system (35%). As compared to 1993, the evaluations of the progress of political transformation in Poland have not changed much. This result can be regarded as surprising considering the fact that communism collapsed nine years ago, and since that time the central government and local authorities have changed several times as a result of democratic elections and the rule of the law has been put into practice more or less

successfully. It can be interpreted as a result of certain terminological confusion - a part of our society understands democracy as a system which guarantees justice (meaning equality) in the sphere of income. A discrepancy between the idealized vision of democracy following from the past and the current practice of political life might be another reason for dissatisfaction with democracy which is so common among Poles. Their low opinion of democracy indicates dissatisfaction with current political life and persistent distrust in the world of politics.



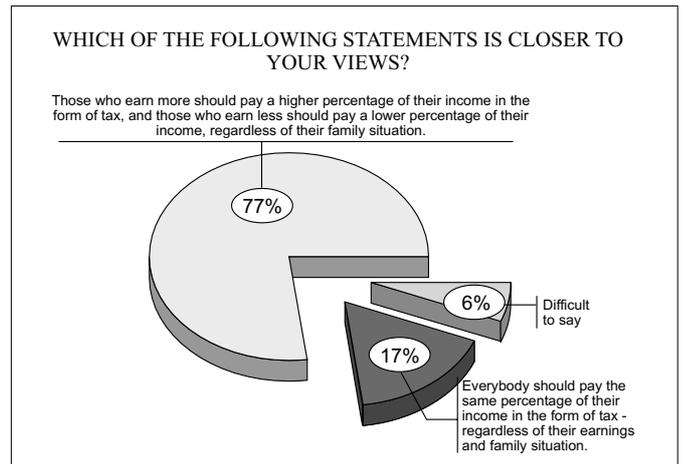
On the other hand, the economic changes are perceived quite differently. The largest group of respondents believe that we have already crossed the "point of no return" in this respect and we are close to the market economy in the full sense. The changes of opinions in comparison with the previous years also point to the fact that the number of people who perceive our economy as a free market economy is growing.

More information on this subject can be found in the CBOS report "Social opinions on democracy", June '98.

OPINIONS ON TAXES

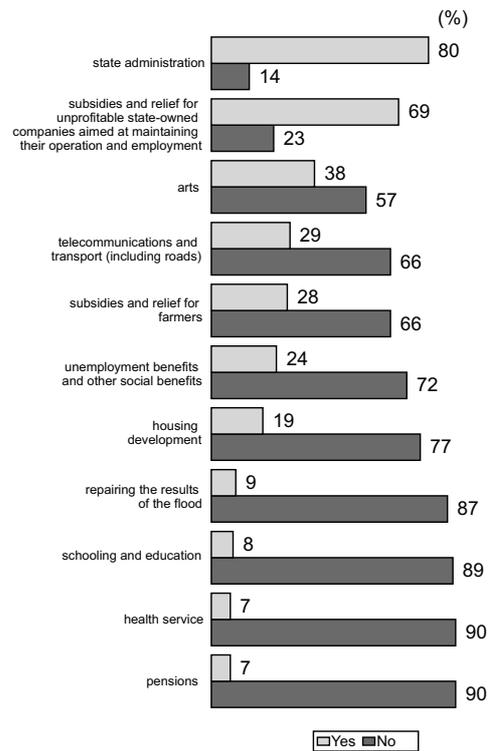
Poles do not have much experience as taxpayers. The majority of adult Poles have been conscious of paying taxes for only a few years. Moreover, frequent changes of tax regulations do not have a positive effect on the stability of this experience. Depending on the current situation of the state budget, not only have tax brackets changed several times, but also the list of categories of tax relief has been extended or shortened, certain gaps in the law disappeared, some imperfect regulations were redefined, personal income tax return forms (PITs) modified etc. The lack of stability and the complexity of the tax system are still criticized by taxpayers. Opinions that the current tax regulations encourage fraud and the concealment of income are quite common. According to the latest press reports, the Ministry of Finance is considering the introduction of flat-rate tax instead of the progressive tax currently binding. We asked our respondents about their views on this issue.

Acceptance of progressive tax is widespread in the society. It seems that this method of taxation satisfies the need for so-called social justice, where the rich pay relatively higher taxes and the poor - relatively lower. This principle is accepted by the vast majority of all social groups, even those who obtain the highest income and evaluate their own financial situation as good.



The idea of flat-rate income tax has gained the most support among persons whose socio-economic status is high. The higher the respondents' education and the better their financial situation, the more frequent is their support for this type of tax system. One in three respondents with higher education opts for flat-rate income tax, nearly as many representatives of the intelligentsia and managers (35%) and almost one in four persons satisfied with their own material status.

IF THE SEJM DECIDED TO REDUCE TAXES AND THE EXPENSES FROM THE STATE BUDGET WOULD HAVE TO BE REDUCED AS A RESULT, WHICH EXPENSES WOULD YOU REDUCE FIRST OF ALL? WOULD YOU REDUCE THE EXPENDITURE ON:



"Difficult to say" answer were disregarded.

Quite obviously, the largest group respondents (54%) would opt for lower tax even if the amount of money spent from the state budget would have to be smaller as a result. However, a large number of respondents believe that there is no need to change the present system (39%). On the other hand, if the acceptance of the specific limitations following from

the hypothetical tax decrease is concerned, it appears that the actual social permission for such a change would be rather limited. In the opinion of most respondents, the amounts allocated from the state budget to finance some particular areas of public life should not be reduced. According to respondents, the state should take special care of the following areas: the national health service, public schools and social insurance. A majority of respondents are also against reducing the expenditure on repairing the results of the last year's flood in southern Poland. A reduction of the amounts spent on housing development, subsidies for farmers, telecommunications, transport and social benefits for persons in need would not gain approval in the society. According to respondents, the only areas where the expenses can be reduced are the state administration and unprofitable state-owned companies.

More information on this subject can be found in the CBOS report "Opinions on taxes", June '98.

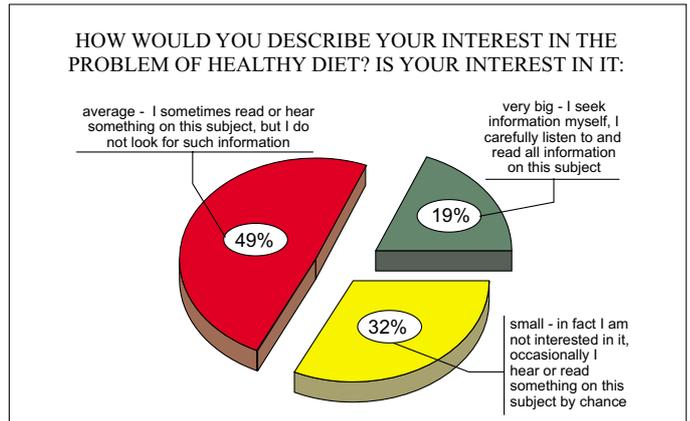
DO POLES EAT HEALTHILY?

Promoting a healthy lifestyle, proper nutrition and the personal responsibility of an individual for his/her physical condition is a relatively new phenomenon in Poland. Although this issue receives quite a lot of attention in the media, especially the press, most respondents are rather critical about the state of their knowledge about healthy diet. Almost two thirds of respondents believe that they do not have enough information on this subject, and only a little over one in three feel well informed.

In their own opinion the majority of Poles eat healthily (75%). However, one in four (21%) admits that his/her diet and eating habits are not proper. Young persons aged from 24 to 34 declare it more frequently than other age groups, while among different socio-occupational groups such declarations are the most frequent among owners of private businesses and farmers.

What are the eating habits of Poles then? Cereal products and potatoes are indispensable components of our daily diet - 92% of respondents eat them at least once a day. Such products as fruit and vegetables or

milk and milk products are less frequently found on our menu. Almost one third of respondents do not eat vegetables every day, even more (41%) do not eat enough fruit. Similarly, the daily diet of two fifths of respondents does not contain enough milk products. Moreover, over half of respondents (53%) do not follow the "model" diet, which involves eating the following food groups: fish, poultry, meat, eggs, beans, peas and other legumes. Almost one third (29%) eat too much food from this group, and one in four respondents eats too little of them. Additionally, eating excessive amounts of sweets is quite common among Poles. One in four adults has this problem.



If one compares our eating habits with the basic rules of proper nutrition, the structure of our daily diet seems to be far from perfect. Only one in seven Poles observes the rules recommended by specialists in nutrition, i.e. eats fruit, vegetables, milk and cereal products at least once a day; fish, eggs, meat or legumes - a few times a week. Persons with higher education, managers and the intelligentsia follow these practices relatively the most frequently.

Eating snacks (sweets, chips etc.) between meals is a quite common deviation from the rules of proper nutrition. Over two fifths of respondents do it very often (at least several times a week), and only slightly more than one third strictly follow the recommendations and avoid eating snacks between meals.

More information on this subject can be found in the CBOS report "Opinions on taxes", June '98.

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

- "The attitude towards the government and opinions on its activity"
- "Political party preferences at the end of May"
- "Social moods in the second half of May"
- "The opinions on the performance of political institutions"
- "The social evaluation of the Colonel Kukliński case after his visit to Poland"
- "Trust in politicians at the end of May"

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