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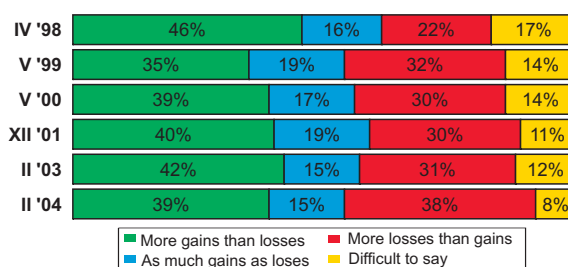
THE END OF OPTIMISM IN THINKING ABOUT THE EFFECTS OF THE EUROPEAN INTEGRATION

Public expectations concerning the effects of Poland's accession to the European Union deteriorated noticeably during the last 12 months (from February 2003 to February 2004). Taking into account the scale of the changes in thinking about the outcome of the European integration, it is justified to speak of the end of social optimism with regard to this issue.

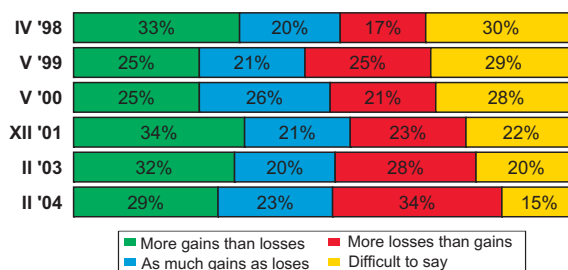
A year ago, optimism prevailed in the expectations of the effects of the integration for Poland. Today, the opinions vary. The proportions of the respondents who believe that the overall result of the integration will be positive for Poland and those who believe otherwise are more or less equal. Pessimism starts to prevail in respect of the anticipated effects of the European integration on the respondents' personal situation. Moreover, a growing number of the Poles believe that the present member states will gain more than Poland as a result of the EU extension.

Growing pessimism in thinking about the effects of the integration manifests itself mainly in the opinions about the socio-economic effects of the integration. The Poles now expect it to have a

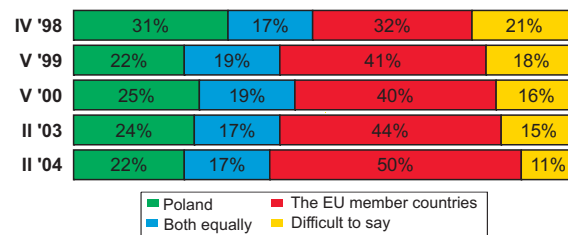
WILL THE ACCESSION TO THE EU BRING POLAND MORE GAINS OR LOSSES?



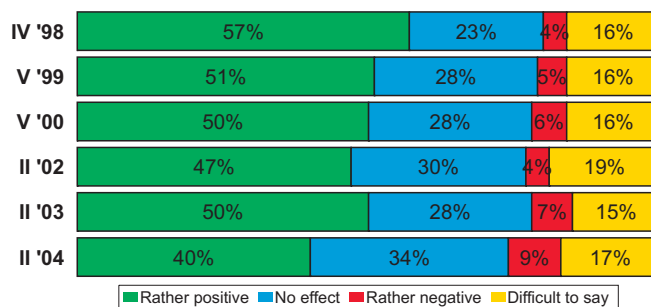
WILL POLAND OR CURRENT EU MEMBER COUNTRIES GAIN MORE FROM OUR ACCESSION?



WILL THE ACCESSION TO THE EU BRING ME PERSONALLY MORE GAINS OR LOSSES?



IN YOUR OPINION, WILL THE INTEGRATION OF POLAND WITH THE EU HAVE A RATHER POSITIVE OR A RATHER NEGATIVE EFFECT ON THE CONDITIONS OF LIVING OF THE POLES?

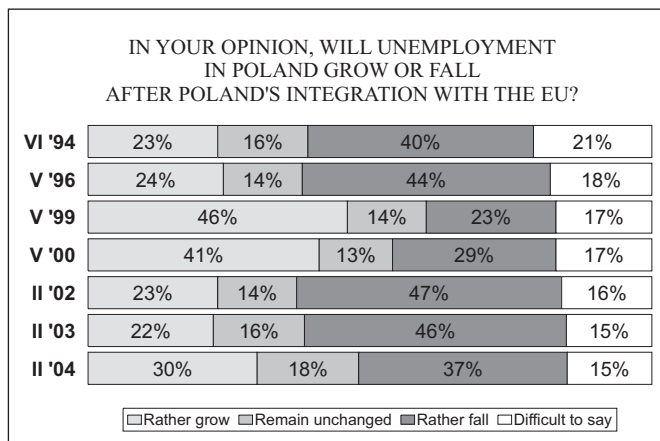


positive effect on the condition of the Polish economy much less frequently than a year before (a drop from 50% to 40%).

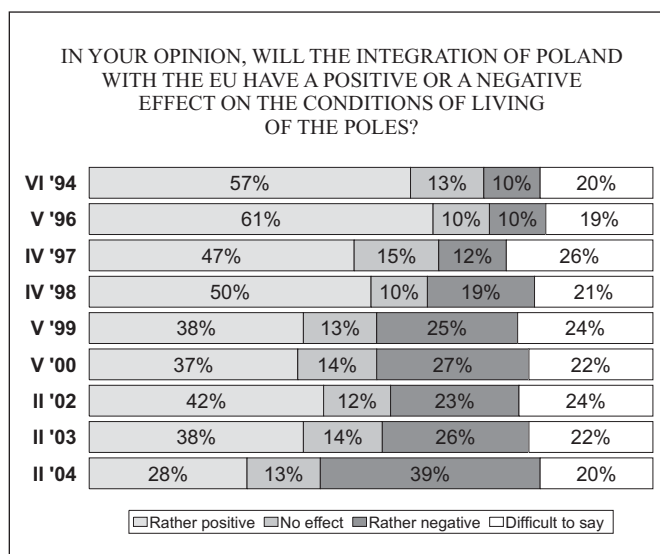
Growing pessimism in the general expectations concerning the condition of the Polish economy is accompanied by an increase in negative expectations concerning the consequences of the integration for both economic sectors. Fewer

people hope that private enterprises and farms will function better after the accession and that the situation of state-owned enterprises will improve. However optimism still prevails in thinking about the future of private firms (37% of the Poles believe that the effect of the integration on the situation of private firms will be positive, whereas 30% believe otherwise). The respondents are more concerned about the future of state-owned enterprises and, in particular, farms (33% and 49% of pessimists and 28% and 27% of optimists respectively).

The hopes for a decrease of unemployment after Poland's accession to the EU are less common now. However, they are still more frequent (37%) than the fears (30%).



The growth of pessimism in thinking about the effects of the integration is particularly visible in the opinions concerning the conditions of living of the Poles. Until recently, i.e. from 1994 till last year, the belief that the accession will contribute to an improvement of the conditions of living of the Poles prevailed. This opinion has changed. At present, more respondents are afraid that the integration will have a negative effect on the standard of living in Poland (39%) than expect an improvement (28%).



That is accompanied by a more and more common belief that the costs of living will grow after the accession. The hopes for pay rises are decreasing, whereas the fears that the prices of goods and services, taxes and social security contributions will grow are more common.

At present, not even a quarter of the Poles expect pay rises after the accession (24%), compared to one-third a year ago. It is a universal belief now that the prices of food will grow after the accession (92%), as well as the prices of energy (86%) and land (81%). As many as three quarters of the respondents (74%) believe now that public transport fares will grow, and almost two-thirds (63%) expect an increase of social security contributions. Nearly half of the Poles (48%) expect an increase of personal income tax.

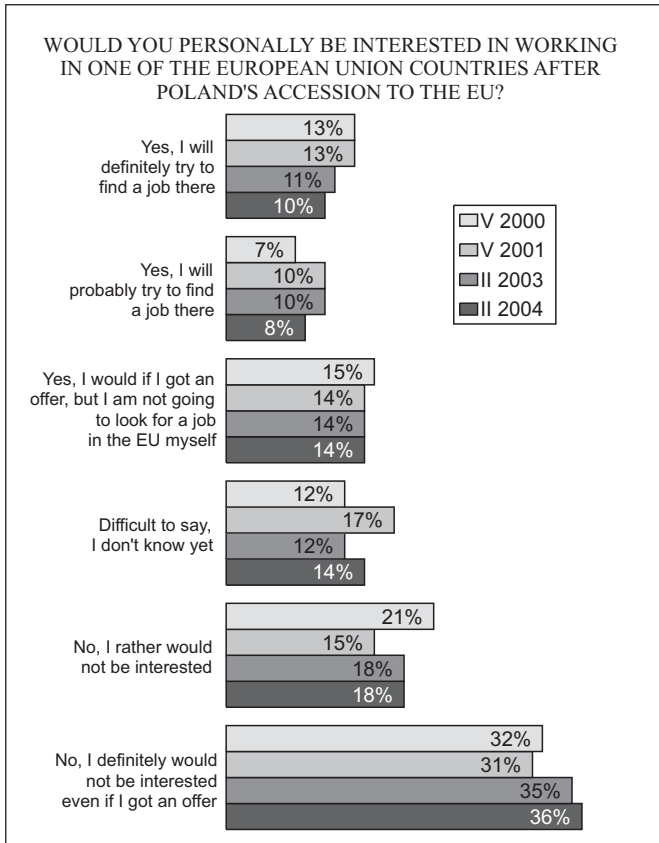
More information about this issue can be found in the CBOS report (in Polish): „End of optimism in thinking about the European integration”, March 2004. Survey executed in February 2004. A representative random sample of the adult population of Poland. N=1024

INTEREST IN TAKING UP A JOB IN EUROPEAN UNION COUNTRIES

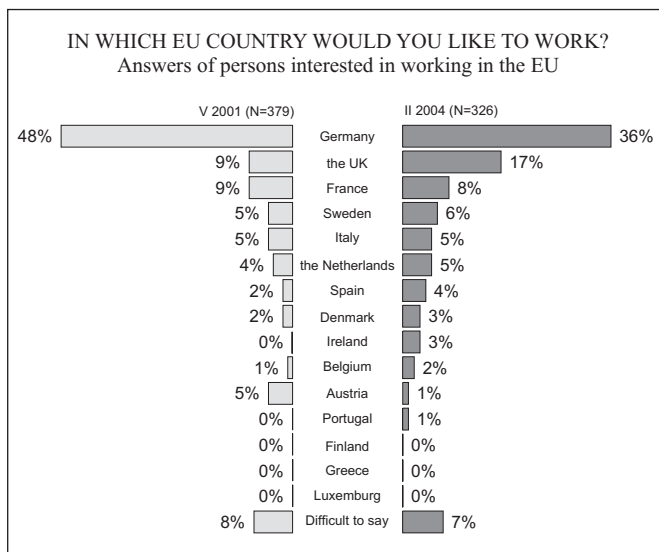
The level of interest in working in the European Union has been quite stable over the last few years. As compared with February 2003, the number of people who are going to look for employment in one of the EU member countries has dropped by 3 percentage points. The realisation that some restrictions with regard to employment in the EU countries will be maintained is probably one of the reasons behind this situation.

Nearly one-fifth of all respondents (18%) declare that they want to look for a job actively in one of the EU countries; of this number, one-tenth (10%) are quite determined to do so. One in seven respondents (14%) would consider such a possibility if they received a job offer. Over half of the Poles (54%) are not interested in taking up a job in the European Union.

Interest in working in the EU is mainly associated with the respondents' age and occupational status. Young people are one of the groups that are particularly interested in finding employment in the EU. Nearly half of all respondents aged up to 24 (47%) declare that they are going to take some steps in that direction. Similarly, nearly half of all students (47%) want to look for a job in the EU. 18% of this group can be described as the most determined. The unemployed are another group whose interest in working in the EU exceeds the average. 40% of this group are going to actively look for a job in one of the EU countries, including 26% of those who declare that they will definitely do so.



Germany is seen as the most attractive job market. Although still more people want to work there than in other countries, the interest in finding a job in Germany is no longer as great as it was in 2001. At present, 36% of the Poles who consider working in the EU would like to work in Germany. The position of the United Kingdom has visibly improved over the last three years 17% of the Poles interested in working in the EU would like to work in the UK. The other countries are much less popular. France, Sweden, Italy and the Netherlands are mentioned relatively the most frequently.

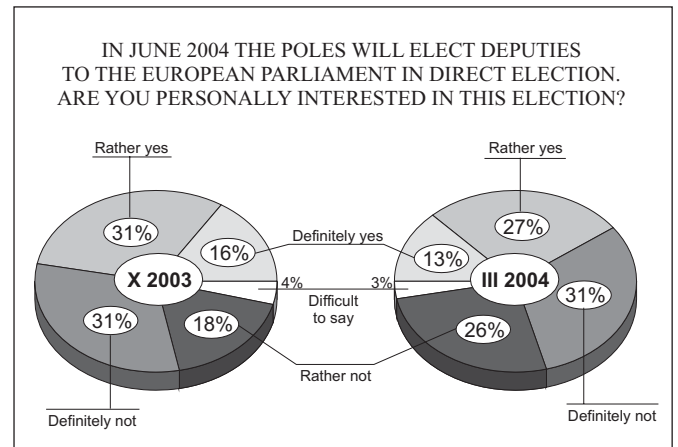


Most of the respondents interested in working in the EU would like to work there temporarily (61% of such respondents) usually for no longer than one year (35%) or for more than one year (26%). Every sixth person from this group would be ready to emigrate (17%). One-fifth of the respondents interested in working in one of the present member countries (21%) would like to live in Poland and travel to work abroad.

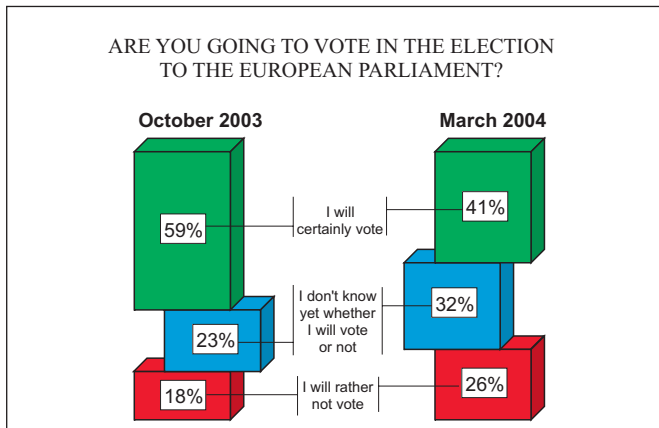
More information about this issue can be found in the CBOS report (in Polish) „Interest in taking up a job in a European Union country”, March 2004. Survey executed in February 2004. A representative random sample of the adult population of Poland. N = 1024

THE POLES ABOUT THE ELECTION TO THE EUROPEAN PARLIAMENT

The Poles will vote for their representatives in the European Parliament for the first time on 13 June 2004. Two months before the election, the declared interest in this political event is not big. Over half of the respondents (57%) say that they are not interested in the election. Only two-fifths (40%) declare interest. The fact that few Poles are interested in voting for Eurodeputies is not the only cause for concern. It is also quite disturbing that the level of declared interest in the election is declining rather than increasing as the date of the election is approaching. As compared with the declarations from October 2003, the percentage of the Poles interested in the election to the European Parliament has dropped by 7 points.



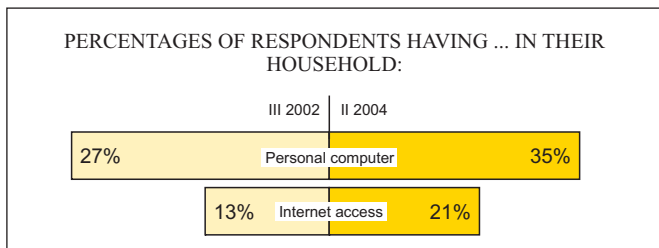
If the election to the European Parliament were held in March, 41% of the Poles would vote (at the same time, much more respondents declared that they would vote in the election to the Polish Parliament 52%). As compared to October 2003, the readiness to take part in the EP election has decreased significantly. The percentage of persons declaring that they would certainly take part in that election decreased by as much as 18 percentage points.



More information about this issue can be found in the CBOS report (in Polish) „The Poles about the election to the European Parliament”, March 2004. Survey executed in March 2004. A representative random sample of adult population of Poland. N = 1022

INFORMATION SOCIETY IN POLAND

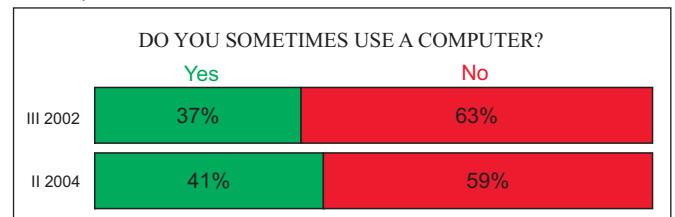
The Internet is less popular in Poland than in most countries with a comparable level of economic development, but the number of users is growing fast.



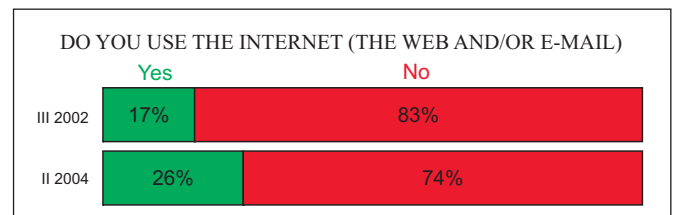
The number of respondents who have a PC in their household increased significantly during the last two years (by 8 percentage points). The percentage of

those with Internet access also increased by 8 percentage points. At present, over a third of adult Poles (35%) declare that they have a PC at home and over one-fifth (21%) declare that they have access to the Internet.

Slightly over two-fifths of the adult Poles (41%) use a computer. As compared the year 2002, the number of computer users increased a little (up by 4 percentage points). The largest group (29% of all adult Poles) use a computer at home. 24% use a computer at work or at school (university). One in six respondents (17%) use a computer somewhere else, e.g. in the library, at friends' house, in an Internet cafe.



Over a quarter of adult Poles (26%) use the Internet, i.e. browse through webpages and/or use e-mail. This proportion increased by 9 percentage points over the last two years. Every fifth adult Pole has an e-mail account and has checked e-mails at least once during the last month.



More information about this issue can be found in the CBOS report (in Polish) „The Internet and computers in households”, March 2004. Survey executed in February 2004. A representative random sample of the adult population of Poland. N = 1024

In addition to the reports referred to above, the following have been published recently (in Polish):

- ◆ The Poles about the attitude of the government and the opposition to Hausner's plan and the consequences of its rejection
- ◆ The opinions about the presence of Polish soldiers in Iraq
- ◆ Durable goods in households
- ◆ Willingness to cooperate with other people
- ◆ Political party preferences in late February - early March
- ◆ Political party preferences in March
- ◆ Further decline in the ratings of the government and the Prime Minister
- ◆ Bad moods of the Poles in March
- ◆ Political and economic implications of the presence of Polish soldiers in Iraq
- ◆ Opinions about the work of the parliament and the president
- ◆ The fear of crime and the attitude to the death penalty
- ◆ The public opinion about public opinion polls
- ◆ Trust in politicians on the eve of the Democratic Left Alliance (SLD) split
- ◆ The social range of unemployment and threat of losing a job

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