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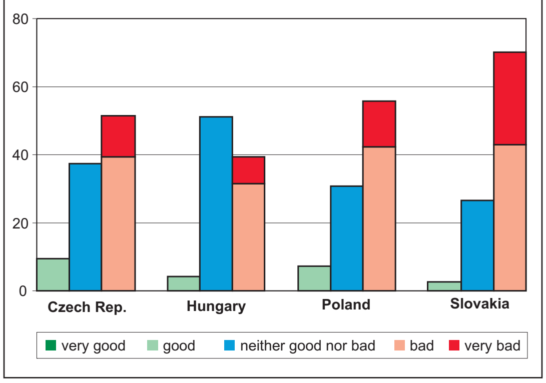
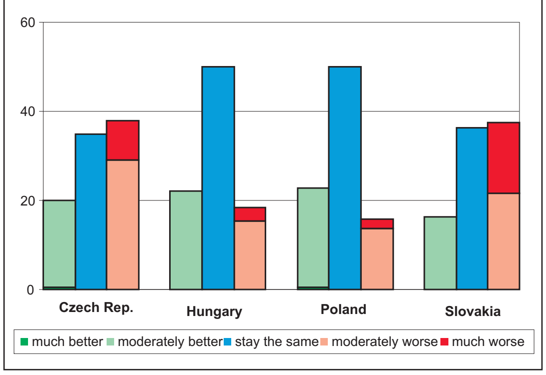
EVALUATION OF COUNTRY'S ECONOMIC SITUATION AND FINANCIAL SITUATION OF RESPONDENTS IN VISEGRAD FOUR COUNTRIES

In general, the citizens of the Visegrad Four Countries perceive their countries' current economic situation as bad or very bad, only small numbers of respondents consider it as good or very good. In Hungary, the majority of respondents see the situation as neither good nor bad, while in the remaining countries, the majorities of respondents consider the situation to be bad or very bad. The most dissatisfied are Slovaks, with 43% describing the situation as bad and 27 % describing the situation as very bad.

HOW DO YOU EVALUATE THE PRESENT ECONOMIC SITUATION IN YOUR COUNTRY?



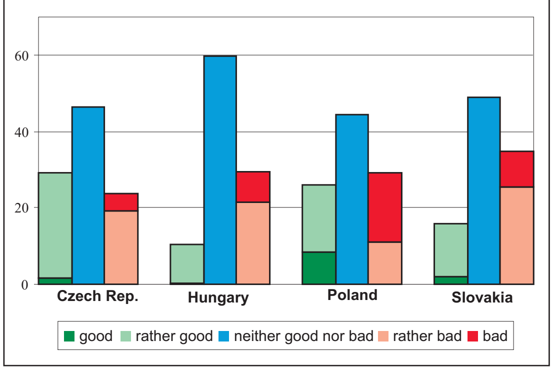
DO YOU THINK THAT, DURING THE NEXT YEAR, THE ECONOMIC SITUATION WILL GET…



Since January 2002, there was a significant shift in the Czech Republic and Hungary towards more scepticism. The number of negative evaluations of economy (bad and very bad) has increased from 35% to 52% in the Czech Republic and from 28% to 39% in Hungary. The mood in Slovakia remained the same, however the Poles were much less pessimistic than 2 years ago (56% those giving negative evaluations in comparison to 75 % in 2002).

It can be said that the citizens of the Visegrad Four Countries do not expect dramatic changes in their countries' economic situation in the course of the next year. Half of the Hungarians and Poles as well as 36% of Slovaks and 35% of Czechs think that the economic situation will stay the same. The most sceptical about the future developments are Czechs and Slovaks who expect that the economic situation will get moderately or much worse in the coming year (38% and 37% respectively). On the other hand, in Poland and Hungary, those that believe in improvement outnumber the sceptical ones.

HOW DO YOU EVALUATE THE PRESENT MATERIAL LIVING CONDITIONS OF YOUR HOUSEHOLD?

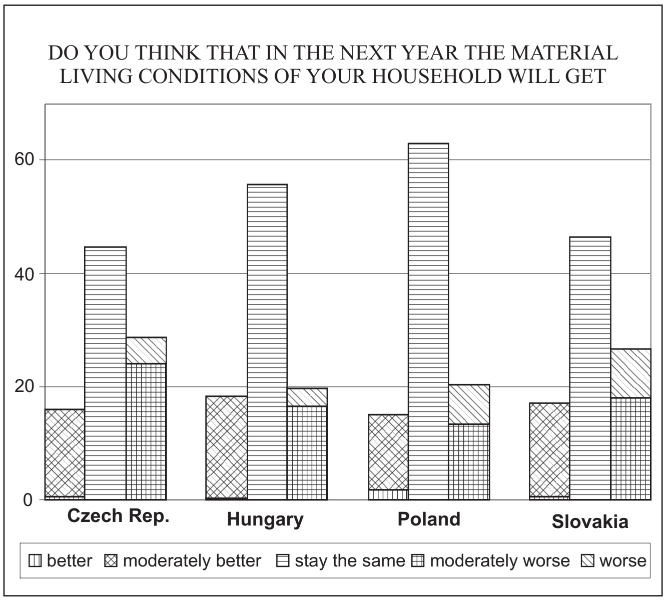


Like in the previous question, also in expectations for the future economic development the Czechs and

Hungarians are more sceptical than two and half years ago with the increase of pesimism by 15% (Czechs) and 10% (Hungarians). On the other hand, the number of respondents answering the situation will get better or much better has increased in Slovakia and Poland.

The biggest groups of respondents in all four countries regard their living condition as neither good nor bad and in general the households' economic situation is perceived more optimistic that the one of their country. The most satisfied with the households' economic situation are Czechs and Poles (28% and 26% respectively). The most polarised society can be found in Poland where 9% of respondents regard their situation as good (while in other countries it is between 0% and 2%) and 18% consider their situation as bad (in comparison to 4-10% in other countries). On a long term, the evaluation of the households' economic situation remains stable.

Not many changes in the material living conditions are expected in Central Europe in one year's time. 63 % of Poles, 56 % of Hungarians, 47 % of Slovaks and 45 % of Czechs expect the situation to remain the same. In Hungary and Poland, the percentage of those who expects improvement and deterioration of their economic situation is relatively similar, with somewhat bigger share of those on the negative side. Czechs and Slovaks lean more towards negative expectations.



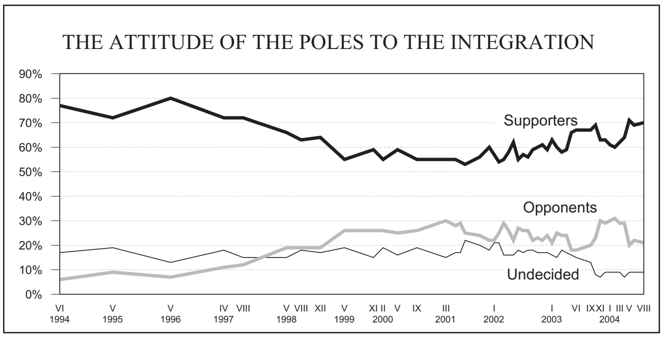
Since January 2002 there was a positive shift in respondents' expectations for coming year in Poland (with 8 % drop in the negative expectations) and in Hungary with 8 % more respondents answering the situation will be better or much better. The Czech and Slovak responses remain virtually unchanged.

Surveys executed as part of a CEORG research project: in Poland by CBOS (July 2004), N= 920; in the Czech Republic - by CVVM (September 2004) N=1053; in Slovakia - by FOCUS (June 2004), N=1063, in Hungary (June 2004), N=1021

FIRST EVALUATIONS OF THE EFFECTS OF POLAND'S MEMBERSHIP IN THE EU

Although it has been a short time since Poland joined the European Union, the first effects of this can already be noticed: most of the society noticed some price increases and farmers noticed increased demand for their products. Also, farmers finally started to believe that they will actually receive direct payments from the EU budget (not all of them believed so before the accession).

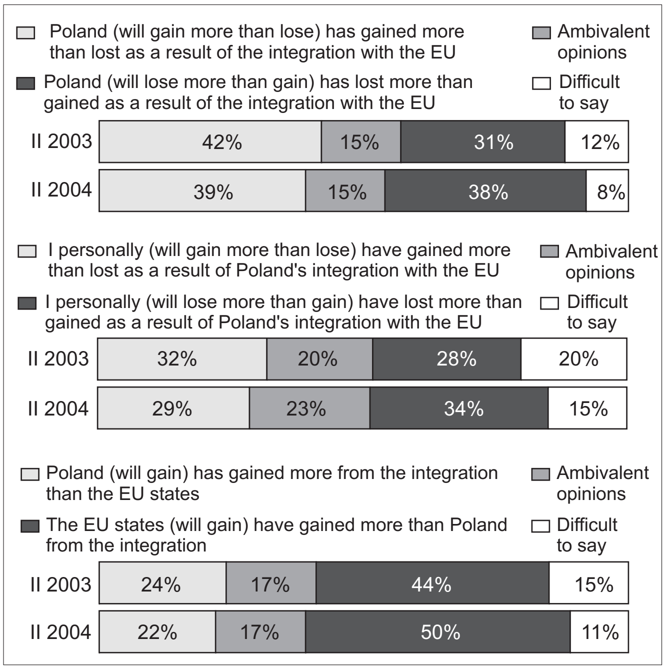
In connection with the accession, the support for Poland's membership in the EU has grown. As early as in May, the proportion of supporters of the integration grew to 71% (from 64% in April), and the percentage of opponents dropped from 29% to 20%. The subsequent surveys confirmed the increase of the support for Poland's membership in the European Union. In August, 70% of the Poles declared their support for the integration, whereas 21% were opposed to it.



The increase of the support for membership in the EU in the Polish society seems to result from a reduction of anxiety and fears, which were more and more visible as the accession was getting closer. The Poles feel relieved even though most of them have not noticed any significant benefits arising from the integration yet, because the worst case scenarios did not come true. The first evaluations of the effects of the integration, made by the respondents three months after the EU extension, are quite prudent, but less pessimistic than it was expected. In February 2004, i.e. three months before the accession, nearly two-fifths of the respondents (39%) expected that Poland will gain more than lose as a result of the integration, and an almost the same percentage believed otherwise (38%). At present, positive evaluations more visibly outnumber negative ones 39% of the respondents believe that gains prevail over losses and 30% express the opposite opinion.

The respondents find it more difficult to evaluate the effect of the integration on their personal situation. As compared with the expectations expressed in February, the evaluations of the effect of the accession on the respondents' lives are usually quite ambiguous. As previously, negative evaluations of the effects of the integration on the respondents' personal situation slightly outnumber positive ones. Almost one-third of the respondents (31%) believe that they have lost more than gained as a result of the integration, whereas almost a quarter (24%) express the opposite opinion.

In February 2004, 50% of the respondents thought that the old Member States would gain on the accession of Poland to the European Union more than Poland. At present, 43% of the respondents express this opinion. Less than a fifth of all respondents (19%, a drop by 3 percentage points since the beginning of the year) believe that Poland is the main beneficiary of the integration.

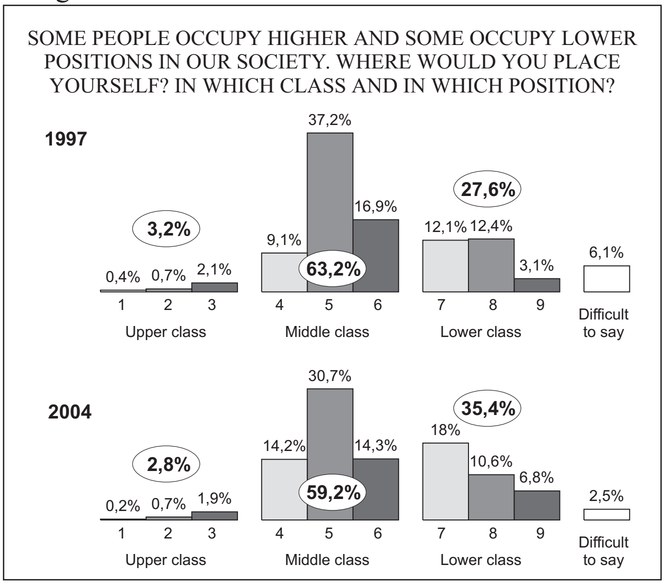


Farmers are a social group whose attitude to the integration has improved the most. For may years, scepticism and opposition to the integration were bigger among the farmers than in any other social group. Even in May, a week after the accession, the proportion of farmers who supported the integration was only slightly bigger than the proportion of those who opposed it (42% and 37%, respectively). In the next months (June and August), the percentage of supporters of the integration in this group grew to 67%-68% and the percentage of the opponents dropped to 27%-28%. Farmers and young people (aged up to 24) are the two social groups that admit that they personally have gained more than lost as a result of the accession (40% of the farmers say so, 24% express the opposite view).

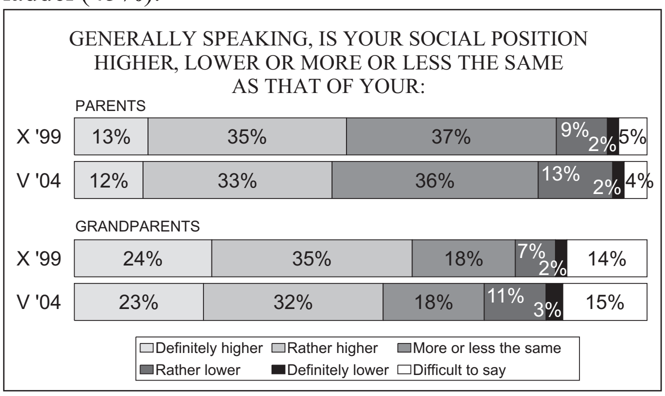
More information about this subject can be found in the CBOS report (in Polish) *The first evaluations of the effects of Poland's membership in the EU*, September 2004. Survey executed in August 2004. A representative random sample of adult Poles. N = 922.

PERCEPTION OF ONE'S OWN PLACE IN THE SOCIAL STRUCTURE

The Poles tend to describe their social position as rather low. The average evaluation on a 1 to 9 scale, where 1 indicates the highest position and 9 the lowest, is 5.91, i.e. below the middle of the scale. Most of the society (59%) place themselves on the middle positions (4-6), while others much more frequently place themselves below (positions 1-3) than above (positions 6-8) the middle. Self-evaluations of social position are now significantly lower than in 1997. These changes are associated with a deterioration of social moods in this period (1997 - 2004). One aspect of this deterioration is an increase of the proportion of negative evaluations of the economic situation in Poland and the standard of living of households.



Most people (55%) believe that their social position is higher than that of their grandparents. Almost half of the Poles feel that they have climbed the social ladder (45%).



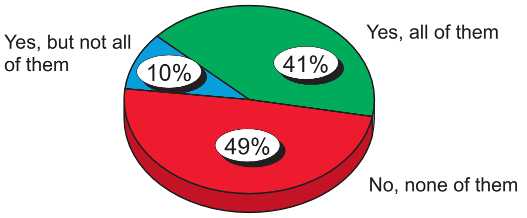
Five years ago the respondents' comparisons of their social position with that of their parents and grandparents were similar. One may conclude, therefore, that most Poles feel that they have climbed the social ladder or remained on more or less the same position as compared with the previous generations. Relatively few people feel socially demoted, but it must be noted that this proportion has increased recently and the social range of the feeling of social demotion is now broader than in the late 1990s.

More information about this subject can be found in the CBOS report (in Polish) *Perception of one's place in the social structure, promotions and demotions*, September 2004. Survey executed in May 2004. A representative random sample of adult Poles. N = 1006

HOLIDAYS AND PAID WORK OF SCHOOLCHILDREN

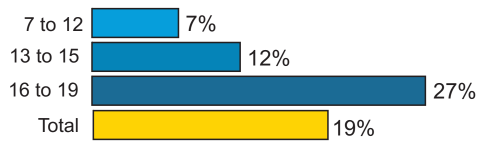
This year's summer holidays Polish of schoolchildren did not differ significantly from the previous year. According to the respondents from households with children and adolescents going to school, every other family (51%) sent their children away for holiday at least for a week (two-fifths of these families organised such holidays for all their schoolchildren and one-tenth for some of them only). Other families (49%) did not organise holidays outside the place of residence for any of their children. The main reason why children spend holidays at home is a lack of money (indicated by 76% of the respondents from households with schoolchildren staing at home).

DID SCHOOLCHILDREN LIVING IN YOUR HOUSEHOLD GO FOR AT LEAST A WEEK'S HOLIDAY OUTSIDE THEIR PLACE OF RESIDENCE?



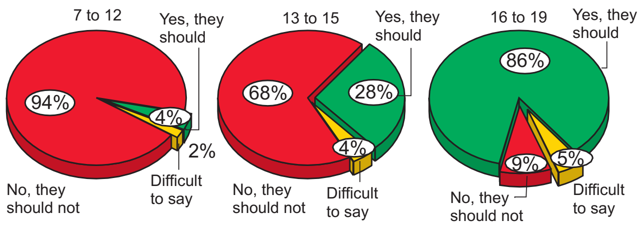
Paid work of schoolchildren during holidays is more and more common in Poland. This year and a year ago schoolchildren worked more than in any other year during the last eleven years. Last summer it was mainly secondary school students who worked (27% of respondents from households with school students aged 16 to 19 confirmed it). In the 13 - 15 age group, 12% of schoolchildren worked, whereas among the primary school pupils (7 - 12 age group) it was 7%.

DID CHILDREN FROM YOUR HOUSEHOLD WORK FOR MONEY DURING SUMMER HOLIDAYS?



The level of social acceptance for working children and adolescents is directly related to their age. Work of the youngest children (those from primary school) meets with general disapproval. Most respondents do not approve of schoolchildren aged 13-15 doing paid work, either. Paid work is generally approved only in the case of secondary school students.

IN YOUR OPINION, SHOULD SCHOOLCHILDREN AND ADOLESCENTS AGED: 7 TO 12, 13 TO 15, 16 TO 19 WORK FOR MONEY DURING HOLIDAYS OR RATHER NOT?



More information about this subject can be found in the CBOS report (in Polish) *Holidays of schoolchildren rest and paid work*, September 2004. Survey executed in September 2004. A representative random sample of adult Poles. N = 969

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

- Majority or proportional elections?
- Opinions about access to the archives of the communist special services
- The Poles about the US Presidential election
- Political party preferences in September
- Social moods in September
- Opinions about the job market and the threat of unemployment in September
- The attitude to the government in September
- Opinions about price increases and changes in consumption
- Smuggling people to Poland
- Opinions about the presence of Polish soldiers in Iraq
- Opinions about the work of the Parliament and the President
- Trust in politicians in September

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