

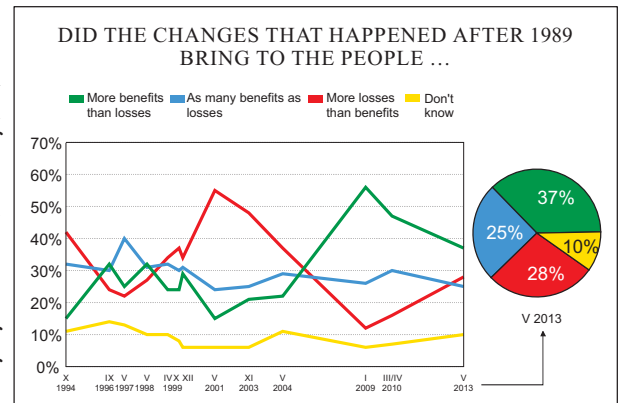
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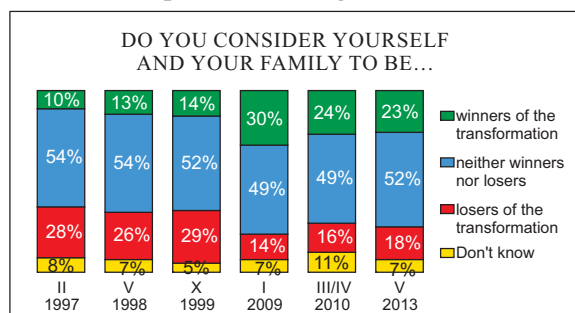
EVALUATION OF THE POST-1989 TRANSFORMATION

Twenty-four years ago, in June 1989, semi-free parliamentary elections were held in Poland. As a result of their outcome, Poland became the first Eastern bloc country in which representatives of the democratic opposition had genuine influence on government.

The evaluation of the consequences of transformation changed with the development of the socio-economic situation. At present, it is divided. The plurality (37%) think that the post-1989 changes brought more benefits than losses. However, this opinion is now much less widespread than in 2009 (a 19-point drop), which was a record year in terms of evaluation of transformation effects. The deteriorating mood is indicated by the rising number of people thinking that it brought more losses than benefits (28%, 16 percentage points more than in 2009). A quarter of respondents think that the balance of costs and benefits is equal.



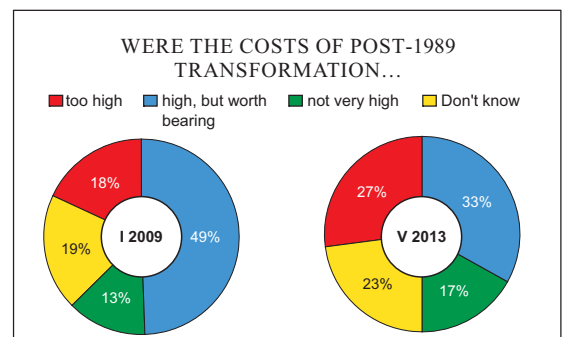
The social consequences of the post-1989 changes are evaluated through the lens of individual experience. A large section of the society (52%) think that the transition had no influence on their life or on their families. About a quarter (23%) consider themselves to be the beneficiaries of the change, while less than one-fifth (18%) think they lost. Even in 2009, when the evaluations of the transformation were the best so far, only about a third of Poles (30%) considered themselves to be the winners of the transition.



The majority (60%) think that the cost of the transformation was high, and some even think it was excessive (27%). Such opinions prevailed even in 2009, when the evaluation of the transformation was the best since 1989. At that time almost half of Poles thought the burden was worth bearing, while now they are more skeptical.

Among the groups who think that the costs of the transformation were too high considering its results are: the unemployed (41%) and, in general, people dissatisfied with the material living conditions of their households (38%). The view that the costs were excessive is frequently shared by people who were over 30 in 1989 (37%).

In spite of the criticism towards the result of the 1989 systemic transformation, Poles do not doubt that it was worthwhile implementing. Even when negative evaluation of its



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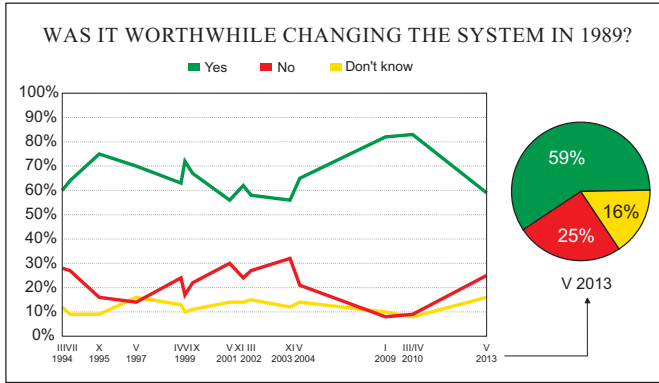
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consequences prevailed, most respondents believed that the system should have been changed. At the end of the previous decade this view was almost universal. At present fewer people subscribe to it (59%), but they are still much more numerous than the respondents unconvinced about the need to change the system in 1989.

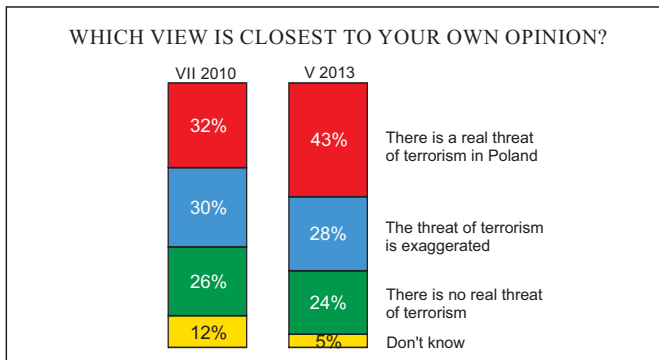


More information about this topic can be found in CBOS report in Polish: "Was it worthwhile changing the system? Societal evaluation of the post-1989 transformation", June 2013. Fieldwork for national sample: May 2013, N=1101. The random address sample is representative for adult population of Poland.

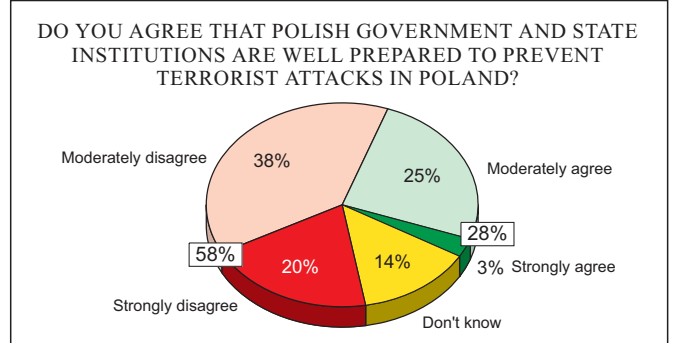
THREAT OF TERRORISM

The bomb attack at the Boston marathon brought back to the fore the issue of terrorist threat from Muslim fundamentalism, both in the US and in other countries participating in the Afghan Stabilization Mission.

Over two-fifths of respondents (43%) share the opinion that Poland is under genuine terrorist threat. Since the measurement taken three years ago, their proportion has increased by 11 points, which means that this threat appears more pressing than before. Over a quarter (28%) believe that the threat is exaggerated, while a smaller group (24%) see no such danger at all.



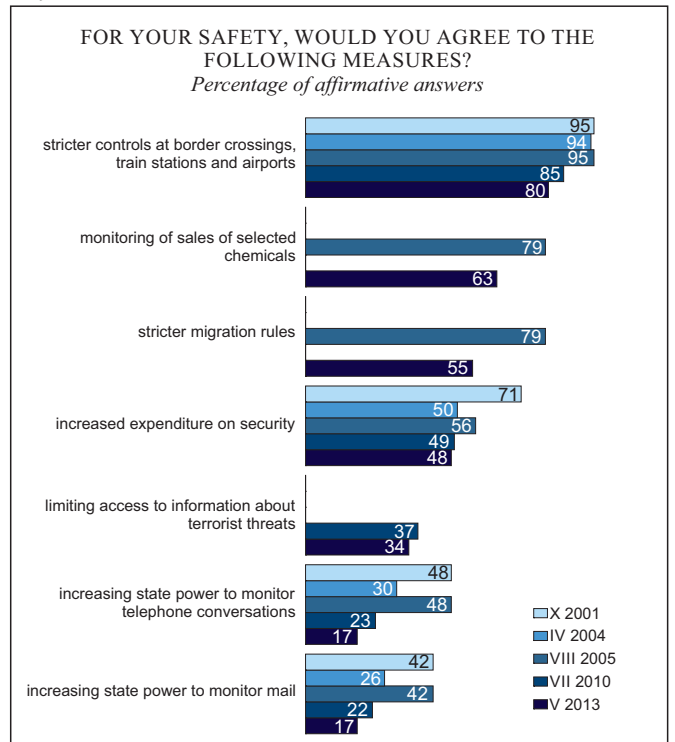
The level of preparation of the Polish government and state institutions is evaluated negatively. Almost three-fifths (58%) think they are not ready for such a danger.



In order to reduce the threat of terrorism, the vast majority of respondents (80%) would agree to introduce stricter controls at border crossings, train stations and airports. Almost two-thirds (63%) would accept the monitoring of sales of chemical substances, and a majority (55%) would accept stricter rules for migration. In case of all of the above, the acceptance has decreased.

Poles are strongly divided in their readiness to bear additional costs to pay for security. Close to half (48%) would be willing to pay, and a slightly smaller group (44%) disagree.

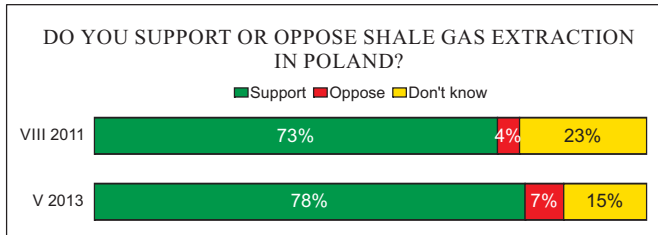
The majority of the society (58%) reject state-imposed limits on information about the terrorist threat. There is even stronger criticism of increasing state power to put citizens under surveillance, i.e. monitor telephone conversations or mail (79% reject each). The approval of increasing state powers in these two areas is lower than at any time before.



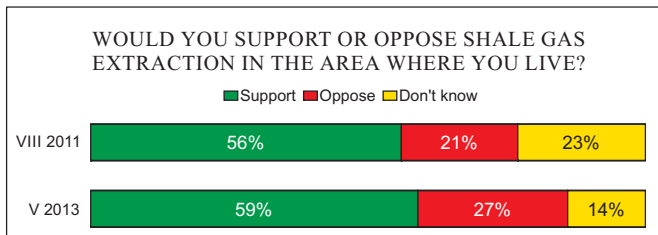
More information about this topic can be found in CBOS report in Polish: "Threat of terrorism", June 2013. Fieldwork for national sample: May 2013, N=1072. The random address sample is representative for adult population of Poland.

ATTITUDE TO SHALE GAS EXTRACTION

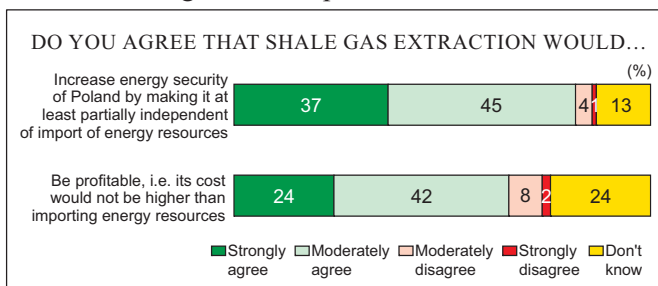
The attitude to shale gas extraction is slowly clarifying. Overall, it is positive. In the last two years, the already high level of acceptance of exploration of this source of energy has increased. Four-fifths (78%) approve of shale gas extraction in Poland, while only a small group (7%) express disapproval.



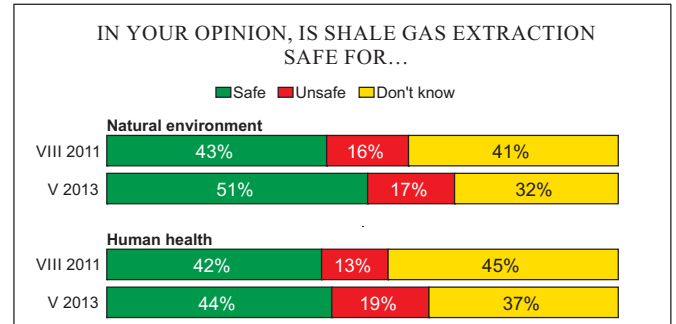
In the last two years, the proportion of people opposed to shale gas extraction near their place of residence increased by 6 points, reaching 27%. Nevertheless, the majority (59%) still support this idea.



Four-fifths of respondents (82%) believe that shale gas extraction would increase the energy security of Poland by making it at least partly independent of energy sources from abroad. In the opinion of two-thirds (66%), shale gas extraction would be profitable, i.e. its cost would not be higher than imported resources.



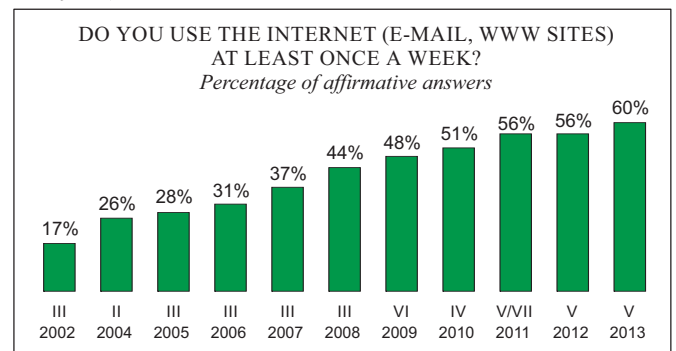
Poles are relatively optimistic about the economic effects of shale gas extraction, but there are worries about the safety of this process. With the passage of time, the level of knowledge about the consequences of this type of mining remains insufficient. In the last two years, the conviction has strengthened that shale gas extraction is safe for the natural environment. At present, 51% of Poles express this view (an 8-point increase since 2011). At the same time, the percentage of people afraid about its influence on human health decreased by 6 points, to 19%.



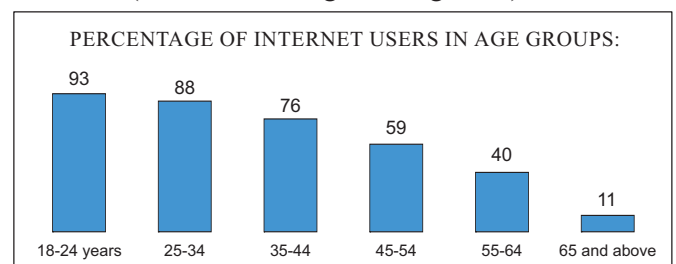
More information about this topic can be found in CBOS report in Polish: "Social attitude to shale gas extraction", June 2013. Fieldwork for national sample: May 2013, N=1101. The random address sample is representative for adult population of Poland.

INTERNET USE IN 2013

In the previous decade, internet use spread dynamically. In 2002, less than one-fifth of Poles (17%) used the web, and in 2010 half of all adults (51%) did. This year, further increase in the number of users has been noted. At present, 60% are online (4-point increase since last year).

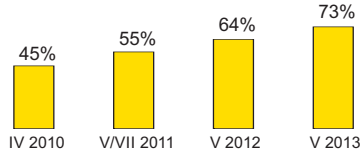


The strongest determinant of internet use is age. Almost all young people are online, but the proportion of users decreases in older age groups. Internet use depends also on socio-economic status (better education and higher income increase the probability), and place of residence (internet use is higher in big cities).



As the popularity of mobile devices increases, the number of users who connect to the web through wireless access rises. At present, they constitute 73% of all web users, which indicates a 9-point growth since last year and 28-point rise relative to the survey taken 3 years ago.

DO YOU CONNECT TO THE INTERNET THROUGH WIRELESS ACCESS, USING MOBILE DEVICES SUCH AS LAPTOP, SMARTPHONE, NETBOOK, TABLET ETC.?



Affirmative answers of internet users only

A lot of activities are performed online. In the month preceding the survey, two-fifths of web users (42%) shopped online. The number of people buying on the internet has risen in the last year and now it is the highest recorded in the last eleven years.

In the last eight years, the number of Poles accessing bank services via the internet has systematically increased. This year, three-fifths (59%) of web users declare having accessed their bank account online in the month preceding the survey.

Downloading free software, music and films is an activity performed by one-third of web users (34%). Paying for content available online is relatively rare, being declared by one-eighth of users (12%).

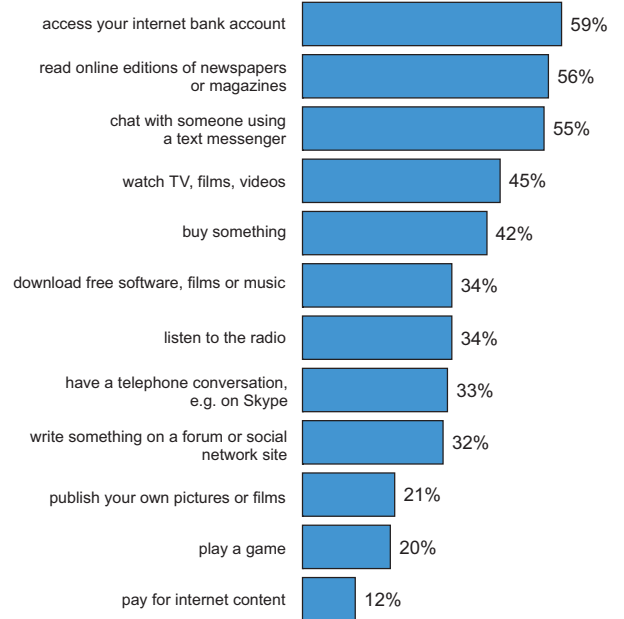
In the month preceding the survey, three-fifths of internet users (56%) read newspapers or magazines online. Internet has increased in importance as a channel for transmitting TV programs, films and video materials: spectators are almost half of web users (45%). Listening to online radio is less popular: one-third of web users do it (34%).

The majority of internet users (55%) used a text messenger, either as a separate program or attached to a website. One-third of users (33%) conduct telephone conversations online.

Almost one-third of users (32%) wrote something last month on a forum or a social network site. Playing games online is less popular, being declared by one-fifth of people using the internet.

In the month preceding the survey, one-fifth of people using the internet published some materials online, such as their own pictures or films.

IN THE LAST MONTH, DID YOU DO THE FOLLOWING ACTIVITIES ONLINE...



Affirmative answers of internet users

More information about this topic can be found in CBOS report in Polish: "Internet use in 2013", June 2013. Fieldwork for national sample: May 2013, N=1101. The random address sample is representative for adult population of Poland.

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

- ◆ Poles About Tax Returns and Tax Offices
- ◆ Suspicious or Forgetful? About Tax Deduction for Public Benefit Organizations
- ◆ Attitudes Toward Animals
- ◆ Party Preferences in June
- ◆ Opinions About Annual Parental Leave
- ◆ Opinions About Public Institutions
- ◆ Attitude to Government in June
- ◆ Social Moods in June
- ◆ Trust in Politicians in June
- ◆ The Day before Waste Revolution
- ◆ Attitudes Toward Unusual Fortuitous Events
- ◆ Year After Euro 2012
- ◆ Individual Success and Its Determinants

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