

THE RESTRUCTURING OF THE HUNGARIAN MEDIA SYSTEM

ÁGNES URBÁN¹

ABSTRACT: *The history of the Hungarian media system over the past decade and a half can be described as the decline of the market economy, the restriction of competition, and the capture of the media. State intervention has taken many forms, ranging from ownership restructuring to the market-distorting effect of state advertising and pressure on independent media outlets. Individually, these would be noteworthy developments in an EU Member State, but in Hungary, state intervention in the media market has become systemic.*

The paper describes the main elements of this systemic intervention and their interaction. The transformation of the Hungarian media system is not due to any one factor alone but rather to the fact that media policy actions have been unidirectional, and over time, the state has become a major player even where market conditions have prevailed. The current Hungarian media system is worryingly similar to what it was before the political transformation, but with the notable difference that administrative instruments have been replaced by less visible market interventions.

KEYWORDS: *Media market, media capture, media ecosystem*

INTRODUCTION

The transformation of the Hungarian media market and the capture of the media scene have been the subject of several studies, research, and international reports. Due to the small size of the country and its linguistic specificities, it

¹ Ágnes Urbán is associate professor at CUB and director of Mérték Media Monitor. E-mail: agnes.urban@uni-corvinus.hu. This work was supported by the European Union H2020 research and innovation program under the grant agreement 101004534 – Mediatized EU – H2020 – SC6 – Transformations – 2020.

is highly unusual that Hungarian developments should be so prominent in the literature in the context of an economic or social phenomenon. Hungary is only used as an example in most analyses of the Central and Eastern European region, but its media capture is unique in that for many authors today, it is Hungary that is one of the most interesting cases (Dragomir, 2019; Griffen, 2020).

This particular attention is probably due to two factors. On the one hand, an unparalleled wealth of instruments has been used to capture the media in Hungary, with strong state intervention in every element of the media system. On the other hand, the fact that Hungary is a member of the European Union makes the situation special. The EU provides a stable, value-based institutional environment where strong restrictions on the public sphere seem unthinkable. Yet the Hungarian case has made many people realise that this can happen in the European Union. Truly effective institutional responses are still to come, but many have already recognised that the Orbán regime's media policy contains innovations that have never been tried before.

There are countless examples in history of when a media system has come under strong political control. Without analysing the specific historical examples, these often involve dictatorial political powers and administrative means of power, such as institutionalised censorship, the closure of newsrooms, imprisonment or, in the worst cases, the killing of journalists, which factors have all played an important role in restrictions on the public sphere. If we look at the countries where press freedom has been most violated, such as Russia or China, censorship and restrictions on access to global online platforms also play a major role. Of course, there is no such thing in Hungary, which is what makes the Hungarian situation so special.

The study shows how the systemic nature of market interventions has captured the Hungarian media. There is no central censorship; online platforms are freely available, and people can write anything they want. There is no element of Hungarian media regulation that would attract serious international criticism, and the European Union has been unable to get a grip on individual decisions on competition grounds for many years. However, the system that has been built up since 2010 has, on the whole, resulted in a situation that has attracted criticism from international organisations and has been a major focus of the European Union's rule of law investigation (Reporters Without Borders, 2024; European Commission, 2024).

KEY FEATURES OF THE EVOLUTION OF THE MEDIA SYSTEM

Hungary regained its freedom with the regime change in 1989/1990. The transformation of the whole political system naturally went hand in hand with the transformation of the media system. With the collapse of the Soviet bloc, a market economy began to emerge, foreign investors appeared, and economic processes that it was hoped at the time would lead to the emergence of a free and economically viable media industry were set in motion.

The first signs of change came from the major newspaper publishers. As in many countries of the region, spontaneous privatisation appeared in Hungary. This consisted of journalists collectively resigning from their previous publishers and collectively signing new contracts with the publishers they had founded. Later on, managed privatisation became more and more prevalent, but journalists and editors were often involved in this process. It soon became clear that publishing companies were not much good without journalistic knowledge or the brand names of the newspapers, which were typically easy to acquire because of the shortcomings of media regulation (Gálik, 1997).

In the print media, the new structure was established quite quickly. Investors with capital were needed, and the big international publishing companies saw business potential in the Hungarian market, so a significant number of newspapers were taken over by foreign owners. At the same time, the publishers and editorial offices were headed by Hungarian managers who had both local knowledge and language skills. As Galambos (2008) has pointed out, the influence of foreign investors in the media, including journalism, was limited. In other industries, Western European or American investment was associated with the adoption of Western standards, while this was not the case in journalism. Foreign investors did not pay attention to bringing the newspapers they bought up to the professional standards of their own publishers' home countries or to establishing their editorial standards, systems and methods. Professional investors in journalism essentially behaved as simple financial investors.

In the radio and television market, the party-state structure formally remained in place for much longer. The new media law entered into force in 1996, and the frequency tenders were held in 1997, allowing the launch of national commercial radio and television stations. Legally, the 1996 Media Law also created the institutional framework for public service broadcasting, but it was, of course, based on the former state radio and television broadcasters.

Even if slowly, in the nineties, the possibility of a democratic media system emerged in the Hungarian media environment. The golden age of the media came at the turn of the millennium: It took a decade after the fall of communism

for the most important institutions and features of the democratic system and the market economy to take root. Tabloids flourished, as did commercial media. The economy grew, and advertisers were happy to spend and increase their advertising revenues. The internet was already a threat to traditional media companies, and this brought a new set of challenges. Google emerged and quickly became dominant on the entire internet by acquiring the video-sharing portal YouTube in 2006. Facebook became available in Hungarian in 2008 and has since seen an explosion in the number of Hungarian users.

The economic crisis of 2008 marked a turning point in the development of the media. Economic growth in the vulnerable countries of Central and Eastern Europe stalled, and advertising revenues plummeted dramatically. The economic downturn did not leave foreign investors unscathed, with many large companies leaving the region because the returns were no longer as high as before.

Whether growing or declining, the development of the Hungarian media system followed regional trends until 2010. The real change came with the coming to power of the Orbán government and the adoption of new media laws. In 2010, Parliament adopted the two laws most relevant to the media. Act CIV of 2010 on Freedom of the Press and on the Basic Rules Relating to Media Content (Smtv) established the framework, while Act CLXXXV of 2010 on Media Services and on the Mass Media (Mttv) contains the specific regulation. A completely new regulatory environment emerged, which allowed for much greater state intervention than before and, thus, a transformation of the media system (Polyák-Nagy, 2015).

The most important feature of the post-2010 transformation is its systemic nature: the interventions of the Orbán governments have pointed in the same direction and been integrated into a coherent whole (Polyák, 2022; Benedek, 2024). Another characteristic is that, besides the obvious instruments of political intervention, such as the media authority and the political control of public media, there is a very strong market intervention. Instead of administrative instruments, market instruments predominate, such as market distortion, interference in market processes, and giving some actors a competitive advantage and others a competitive disadvantage.

CHANGES IN OWNERSHIP

As we have already mentioned, after the fall of communism, the emergence of the market economy brought foreign investors, but no one expected foreign

ownership to remain dominant in the Hungarian market for only two decades. There were two main reasons for the exodus of investors.

After the crisis of 2008 and the start of the growth of digital platforms, some foreign investors started to sell their investments in Central and Eastern Europe, and with this, there was a change of ownership structure in the region (Dragomir, 2019). The situation in Hungary was unique in that the adoption of the new media laws in 2010 led to uncertainty in the regulatory environment, so there was a country-specific reason for the change in ownership strategies in addition to global developments.

Studies that have analysed the Hungarian media system after 2010 all focus on media ownership and changes in the market environment (Bátorfy, 2022; Polyák, 2022; Kovács et al., 2021). Overall, the pattern is clear; foreign professional investors have been replaced by Hungarian investors loyal to the government, but there are differences in how and in what ways this has happened. In some cases, a media authority decision had to be made to persuade an investor to sell a significant part of its stake, but typically, business rationality prevailed. Every media company has its own history, but the exit of most foreign investors has led to an unprecedented concentration of ownership.

One of the biggest investors in the print newspaper market, Finland's Sanoma, has exited the market, along with two smaller publishers: the Swedish Metro International SA, which publishes the free *Metro* newspaper, and Funke Gruppe, which also had the prestigious political weekly *HVG* in its portfolio. The biggest exit from the online media market was Deutsche Telekom, which sold Origo Zrt., a leading news portal. An important development in the television market was the sale of the TV2 commercial channel by the German ProSiebenSat1 (Urbán, 2016).

The history of the Ringier and Axel Springer portfolios, the fate of the former Simicska media empire and, of course, the creation of KESMA are particularly relevant to our topic.

History of the merger between Axel Springer and Ringier

The merger of the German Axel Springer and Swiss Ringier paved the way for pro-government investors to take over the Hungarian media market. The two companies, both dominant in the European newspaper market, announced the merger in 2010, and it was foreseeable that this might be problematic in Hungary as both publishers had significant market shares. It was particularly noteworthy that the new media law included the Media Council of the National Media and Infocommunications Authority in the examination of mergers

involving media companies and required a so-called position paper to assess the impact of the merger on media diversity. On the basis of its expert opinion, the Media Council rejected the merger application of the Hungarian subsidiaries of Ringier and Axel Springer in spring 2011. The interesting aspect of the case was that the Media Council employed no methodology concerning how such media concentration investigations should be conducted and what should be taken into account in the process (Gálik-Vogl, 2011).

The two companies then withdrew their application, but of course, they did not give up on merging their interests in Hungary. It was announced in January 2014 that Vienna Capital Partners (VCP), owned by Austrian businessman Heinrich Pecina, would acquire a significant part of the media portfolio of Ringier and Axel Springer, including the county newspapers, popular daily newspapers, as well as sports, women's and youth magazines. The publishing rights for the remaining newspapers, such as the tabloid *Blikk* and popular magazines, remained with Ringier Axel Springer Hungary, which obtained the merger licence. A regulatory decision thus forced two important professional investors in the Hungarian media market to sell valuable parts of their portfolios to a new player.

The VCP later took the name Mediaworks and became well-known in the autumn of 2016 when it suspended the print and online editions of the leading political daily *Népszabadság* overnight on 8 October. Heinrich Pecina cited business rationality, but given the way the procedure was carried out (closing down an online archive, humiliating staff), essentially everyone immediately suspected political motivation (Fabók et al., 2016). The political background became apparent when the sale of Mediaworks to Opimus Press, which turned out to be linked to Lőrinc Mészáros, a friend of the Prime Minister, was announced a few weeks later.

A later development was that Ringier-Axel Springer, which has a less publicly relevant portfolio, also changed: in 2021, Axel Springer sold its stake, so the major German publishing company, which is also of major importance at the European level, completely relinquished its presence in Hungary.

The Simicska media empire

Perhaps the most spectacular scandal to occur during the Orbán regime erupted in February 2015. Lajos Simicska, an old friend of the prime minister and the ruling party's economic mastermind, broke years of silence and gave numerous interviews in the space of an afternoon. In these, he used obscene language towards the prime minister and broke with Fidesz.

It was immediately clear that the media empire owned by Lajos Simicska would not be left untouched by the scandal. On the one hand, the formerly legendarily pro-government editorial offices changed direction and became critical of the government, and on the other hand, the state advertising that had previously brought these companies significant revenue dried up.

Simicska financed the media companies until the 2018 elections, but then he made some quick decisions: In the week after the election, he closed the conservative daily *Magyar Nemzet*, although a few months later, it was relaunched as a pro-government newspaper. Lánchíd Radio was closed down, and soon afterwards, the weekly *Heti Válasz* too. HírTV was sold to Simicska's former business partner, Zsolt Nyerges, who remained loyal to the prime minister. Simicska's poster (billboard) companies, which became an important political communication tool in the Orbán regime, also went to Zsolt Nyerges.

Interestingly, after the demise of the right-wing, conservative-leaning newspapers, some journalists started a new project. Part of the editorial staff of *Magyar Nemzet* started the weekly *Magyar Hang*, while journalists from *Heti Válasz* created *Válasz Online*. The popular podcast channel *Az élet, meg minden* (Life and Everything) is also produced by a former journalist of *Magyar Nemzet*. These media products have since found their audience and seem to be able to operate sustainably.

The creation of KESMA

Perhaps the most symbolic event in the Hungarian media system was the creation of the Central European Press and Media Foundation (abbreviated as KESMA in Hungarian).

KESMA was founded in August 2018 by Gábor Liszczay, a well-known media personality close to PM Viktor Orbán. The initial board of trustees of the foundation elected well-known Fidesz-affiliated individuals, and although the names have changed, the Fidesz affiliation has remained unchanged since then. According to its Articles of Association, the aim of KESMA is “(...) *to promote those activities of the print, radio, TV and online sections of the Hungarian mass media which serve to build values and strengthen Hungarian national consciousness*” (CEPMF, 2018).

When KESMA was founded, almost all major media owners close to Fidesz (including Lőrinc Mészáros, Árpád Habony, Zsolt Nyerges, Mária Schmidt, and Ádám Matolcsy) donated their companies to KESMA free of charge. Bátorfy (2018) calculates that a total of 476 media brands became part of KESMA and that this move significantly increased the concentration of media ownership in Hungary.

Under real market conditions, the regulators would have had to investigate the merger, and this concentration of ownership could hardly have occurred after a fair investigation. On the one hand, the Hungarian Competition Authority would have had to investigate whether the merger would reduce competition in the relevant market, and on the other, the Media Council would have had to assess the proposed transaction from the point of view of media plurality. This did not happen: On 5 December 2018, a government decree declared the creation of KESMA to be of national strategic importance and thus exempted it from the examination and approval process (Kovács et al., 2021).

Ownership concentration has become significant in the Hungarian media market. KESMA is a particularly strong player in the print daily newspaper market, with all county dailies (18 in total), a political daily (*Magyar Nemzet*), a tabloid (*Bors*) and a free daily (*Metropol*). The KESMA empire also has very strong brands in other media sectors, such as Origo (online), HírTV (television), and Retro Radio.

Of course, there are also media companies that are not part of KESMA, but many are notoriously tied to pro-government investors, as proven by fact-finding journalists (e.g., TV2, Rádió1). According to a calculation based on 2023 revenue data in news and public market, 73.6 per cent of revenues went to the pro-government private media and the strongly pro-government public media (Horváth et al., 2024).

The concentration of media ownership in Hungary has undoubtedly become the basis for the capture of the media. There was no question of the ruling party acquiring media companies illegally by administrative means. There are no legal proceedings in connection to this, and there are no known former investors who had had to buy their companies against their will or at a price. In addition, the pro-government media empire was built not only by squeezing out foreign investors and acquisitions but also by launching new products (e.g. 888.hu, pestisracok.hu, Ripost). On the surface, everything was done according to the framework of market transactions. However, the end result was the exit of most foreign investors, the continued growth of the pro-government media empire and strong ownership concentration.

THE ROLE OF THE MEDIA AUTHORITY

The functioning of the Hungarian media authority (Media Council) has been the subject of criticism for many years, but our present analysis is limited to issues related to market regulation. The licensing of mergers, on the one hand,

and the conduct of radio frequency tenders, on the other, are the two instruments with which the Media Council can directly influence market developments.

As mentioned earlier, the Media Council has the power to authorise or prohibit mergers in the media market by means of a resolution of the competent authority (Mttv. § 216 (5)). The practice of the Media Council has proven to be very selective over the past decade and a half. It has allowed acquisitions and mergers involving pro-government players, thus allowing the pro-Fidesz media empire to grow (only the creation of KESMA prevented the Media Council from opening an investigation, as was previously the case).

Interestingly, in two cases, the Media Council decided that the proposed merger would harm media diversity. First, in 2011, it blocked the merger of two major foreign newspaper publishers, Axel Springer and Ringier, thus making it impossible for a major foreign professional investor to play a leading role in the Hungarian newspaper market. A few years later, in 2017, the Media Council again felt the need to protect the diversity of the Hungarian media: it blocked the merger of Magyar RTL Televízió Zrt. and Central Digital Média Kft. with the obvious aim of preventing German-owned RTL from strengthening its digital business in Hungary.

It is telling that the Media Council has not developed a methodology for assessing diversity in the last 14 years. The task is by no means an easy one, but it would clearly have taken that much time to study the best practices from abroad and to develop a methodology that takes into account the specificities of the Hungarian market. The failure to do so implicitly sends the message that the Media Council does not necessarily want to judge merger cases in a uniform way and that the procedures of the authorities are based on ad hoc decisions.

The role of the Media Council in shaping the radio market is of paramount importance because of the frequency tenders. The process is very well documented, and it has been spectacular to see the winners of radio spectrum tenders change with the political winds. Several of the players associated with pre-2010 radio have disappeared from the market, but others have been so successful that they have achieved essentially national coverage. One of the biggest success stories, with significant expansion of the area of coverage, was Lánchíd Radio, owned by Lajos Simicska until the owner came into conflict with the Prime Minister (Nagy, 2016). A review of the radio tenders for 2023 showed that 21 of the 24 closed tenders were valid. Of these, eight frequencies were acquired by Lőrinc Mészáros' interests, and another six by religious radio stations. Of particular importance is the fact that in 20 out of 24 tenders – 83% – only one bidder submitted a bid, i.e. the tender was conducted without competition (Horváth et al., 2024).

THE PUBLIC SERVICE MEDIA

It is beyond the scope of this paper to describe the criticisms of public service media (PSM) in Hungary, but they are typically related to content. There is no doubt that the news production practices of public service media are very far from what the literature tends to describe as balanced and objective (OSCE, 2022; Urbán et al., 2023; Szávai et al., 2024). We also do not discuss here the leaked materials and audio recordings that demonstrate the overt political interference in the operation of public service media and the marginalisation of professional decisions (Keller-Alánt, 2020; Wirth, 2022).

However, it is important to examine the extent to which the institutional system itself covers the illegal financing of PSM. The role of a special service, the news blocks produced for radio stations, also deserves attention.

The current regulatory environment for public service media was created by the adoption of the Media Act 2010 (Mttv) and the amendment of this Act, which entered into force in the summer of 2015. The regulation is characterised by a split institutional system, which has led to a lack of transparency and a blurring of responsibilities.

According to the Media Act, the Media Service Support and Asset Management Fund (hereinafter MTVA) is the manager of public service assets and finances the production of public service content. The CEO of MTVA is appointed by the President of the Media Council without a competitive tender procedure and can be dismissed at any time without giving any reason, but is not subject to any control by any supervisory body. Also under the Media Act, the public service media is Duna Media Service Nonprofit Ltd. (hereinafter Duna), which is the provider of all public service television, radio and online content services and public service news agency activities. While Duna's operations are subject to institutional control (Board of Public Service Foundation, Public Service Fiscal Council, Public Service Council), MTVA is controlled exclusively by the Media Council.

Duna is really just a facade; it has no real resources, and it does not produce or buy content. Its annual budget for 2023 was HUF 2.2 billion, with an average staff of 92, and nearly 80% of its costs went on personnel (Duna, 2024). Then there is MTVA, which has no meaningful external control but had a budget of HUF 127.8 billion for 2023, with an average staff of 2,144 (MTVA, 2024).

In the European Union, there are rules on the funding of public service media precisely to ensure that competition is not distorted by unlawful state aid (European Commission, 2009). It is highly questionable how well the Hungarian public service media system complies with these rules. Mérték Media Monitor, a think tank, filed a complaint with the European Commission in 2016 concerning

unlawful state aid, but the Commission closed the investigation in 2024. It is highly doubtful that the Commission fully understood the problems associated with the Hungarian public service media (Horváth et al., 2024).

Also, as a result of the specific Hungarian situation, news blocks produced by public service media are broadcast on commercial radio stations, and this is one of the most important means by which public service media can influence the public. In practice, this works in such a way that the news blocks are recorded hourly at MTVA and distributed to the contracted partners, and the radio stations concerned do not have to employ their own news editors. Given the high cost of news production, many commercial radio stations broadcast the news blocks produced at MTVA.

Very little is known about this service; MTVA's annual report for 2021 only contains a half-sentence about it: "We also provide audio news content for 32 radio frequencies" (MTVA, 2021, pp. 115-116.) The 2023 annual report says even less: "[The M1] channel directorate also produces the news blocks that are heard on several rural and metropolitan radio stations" (MTVA, 2024, p. 78). This solution is a good example of how, instead of censoring content by administrative means, a media system can be created in which financial incentives ensure that content is centrally produced and thus highly controlled.

STATE ADVERTISING SPENDING

The market distortion of state advertising spending has been well-researched over the past decade, and indeed, political preferences have been unprecedented in the decisions of state advertisers. However, the problem is not a Hungarian one, and there are plenty of examples in the literature about governing parties rewarding media loyal to them by buying advertising space.

According to Bátorfy (2022), market distortion through state advertising spending is a rational phenomenon from the point of view of political economy, but its dangers can be compensated by a healthy media market. However, this requires both a large, multi-player market and democratic control over the government that ensures transparency and accountability, and thus a kind of constraint. The author concludes that the logic of traditional economics does not apply when a government has access to almost unlimited and uncontrolled resources.

Indeed, the practice of state advertising spending in Hungary is spectacularly distorting the market, and there is a wealth of data and calculations available to support this claim. The phenomenon can be analysed from four main angles: (1) the

increase in the volume of state advertising spending, (2) the increasing concentration of spending since the 2010s, (3) the positioning of pro-government players in different media segments and lack of state spending of independent players, and (4) the extremely large share of state advertising spending in some media.

The first issue is the increase in the volume of state advertising spending. The joint data visualisation project of Mérték Media Monitor and the Átlátszó investigative portal examined spending between 2006 and 2018. The figures clearly show a spectacular increase in the amount of spending, but this did not start in 2010, but later, in the 2014 government term (Bátorfy-Urbán, 2019). This may be surprising at first sight, but it is not really, as the media landscape changed significantly after the 2014 elections, with the ruling party creating a much more diversified portfolio after the previous Simicska era. With the Simicska rupture, Fidesz lost a significant part of its media background and had to build up several new media brands, and the cost of financing also increased. The more the pro-government media empire expanded, the more it cost.

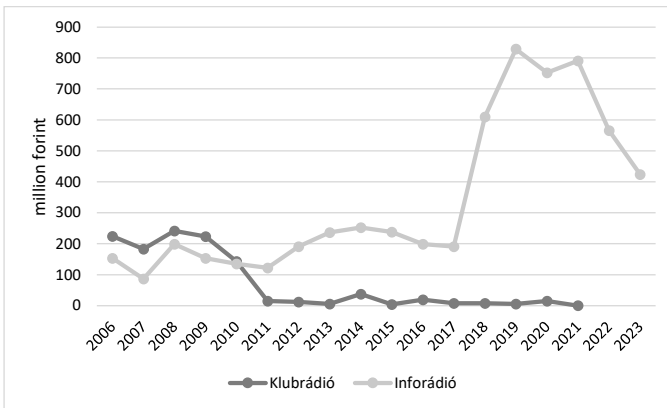
The second important phenomenon is the increasing concentration of spending. Urbán (2015) examined the Herfindahl-Hirschman Index (HHI) and the C4 concentration coefficient of state advertising spending in six media segments between 2006 and 2013. A sharp increase in concentration was observed in the daily newspaper market, the magazine market, the radio market and the outdoor advertising market after 2010, i.e. while under the socialist government, state advertisers advertised in a wide range of media, under the Fidesz government state resources in these sectors have mainly been channelled to a few selected media. During this period, no such change was observed in the television market, while the online market showed a slightly different, wave-like trend in terms of concentration indicators.

The third well-described phenomenon is the market distortion effect. This is the basis of the complaint that the Mérték Media Monitor, together with other complainants, submitted to the European Commission in 2018. Among other things, the submission made comparisons between media brands that are roughly similar in size and attract similar audiences, suggesting that their advertising value should be roughly similar according to formal logic. The research used the Kantar Hungary advertising monitoring database, which shows list-price advertising spend. Below are two time-series plots associated with the complaint, with updated data.

Figure 1 shows data about two Budapest talk radio stations, Inforádió and Klubrádió. The two stations had similar reach and listenership (when they were still participating in the radio audience measurement, Klubrádió's listenership was even greater), and before 2010, the two stations had similar revenues from state advertising. Klubrádió is a left/liberal radio station and is highly critical of

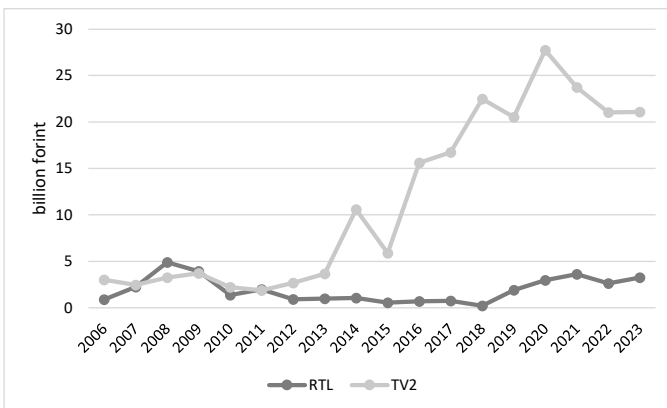
the Fidesz government that has been in power since 2010, while Inforádió is right-wing oriented and quite loyal to the Fidesz government. This probably explains the fact that from 2011 onwards, Klubrádió hardly received any state advertising, while at the same time, the advertising decisions of state institutions spectacularly favoured Inforádió. Klubrádió lost its frequency in 2021, after which it was removed from the Kantar database. Interestingly, the state advertising budget for Inforádió started to decrease after Klubrádió lost its frequency.

Figure 1: Klubrádió and Inforadio’s revenue from state advertising at list price (2006-2023)



Source: author’s editing based on Kantar Hungary data

Figure 2: RTL and TV2 revenue from state advertising at list prices (2006-2023)



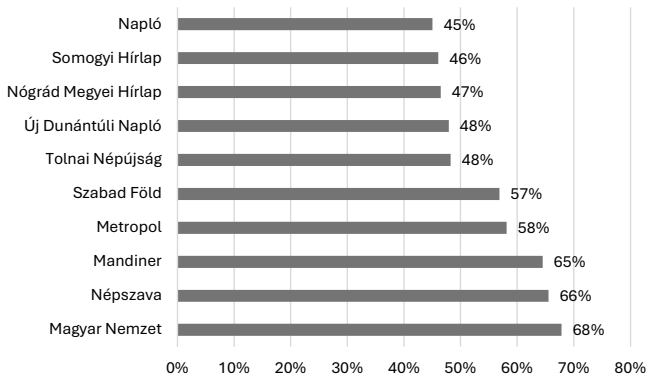
Source: author’s editing based on Kantar Hungary data

RTL and TV2 are the two leading commercial television channels in Hungary, with similar audience shares and revenues in the years under review. RTL was the market leader for a long time, but TV2 took the lead first in terms of revenue in 2017 and then, unsurprisingly, in terms of audience share in 2018. Even more interesting is what can be seen in the competition for state advertising: the two channels had similar revenues from this source until the early 2010s, but then the trends diverged. RTL was owned by the international RTL Group throughout the whole period, while TV2 was taken over by a pro-government investor at the end of 2013 and has remained with them ever since. As can be seen from the graph, after 2013, state advertising money started flowing to TV2, and RTL was put at a competitive disadvantage as a result.

The above examples are illustrative, but the pattern is clearly identifiable: among companies with similar audience reach and in close competition with each other, advertising goes to media that demonstrably support the interests of the ruling party (TV2) or at least in terms of editorial principles are loyal to the ruling party (Inforádió).

Finally, and this is the fourth clearly identifiable phenomenon in relation to state advertising, there are media companies for which the share of state advertising in their total advertising revenue is significant.

Figure 3: Some media brands with a large state advertising revenue share (2023)



Source: Horváth et al., 2024

Figure 3 clearly shows that there are media that obtain a significant share of advertising revenue from state sources. These are typically pro-government media, part of KESMA (9 out of 10 media brands), and would obviously face a

serious challenge if they had to compete on fair market terms. Under real market conditions, it is inconceivable that a media company would obtain a significant part of its advertising revenue from the state: the state advertising revenue share is typically a few per cent.

It may be striking that the left-wing *Népszava* also features prominently on this list. There is a duality with *Népszava*: the content is critical of the government, and there have been some good journalistic achievements, but there is a clear governmental intention to maintain the paper, and thus journalistic freedom has its limits. If state resources were to dry up, *Népszava* would probably face difficulties similar to those of the pro-government papers.

All of the factors examined above, i.e. the increase in the volume of state advertising spending, the high concentration of spending, the strong preference for pro-government media products, and the extremely high exposure of some media to the state, provide evidence of the market-distorting effect of state advertising. Bátorfy and Urbán (2020) have described how the arbitrary use of public resources distorts competition, and firms that are truly market-oriented cannot compete with those backed by essentially unlimited public resources. This can easily lead to the disappearance of market-based news sources and, through this, to a loss of diversity and a loss of democracy.

THE ROLE OF THE MEDIA ECOSYSTEM

One of the peculiarities of the Hungarian media system is that state intervention is much broader than simple ownership and the state financing of media loyal to the government. A real feature of the system is that, in addition to the media industry, the role of pro-government investors in the so-called media ecosystem has become significant, further increasing the vulnerability of independent media companies. The media ecosystem refers to companies and sectors that are not involved in content production but still have a significant impact on the operations of media companies (Kovács et al., 2021).

Media agencies act as intermediaries between media companies and advertisers. The agencies are entrusted by advertisers with campaign planning, i.e. media agencies buy advertising space from media companies. It is therefore a typical commercial market in which the state does not, in principle, have a significant role.

In Hungary, the management of state advertising became really concentrated after 2014, when the government established the National Communications Office (abbreviated as NKOH in Hungarian). This office is responsible for state

communication: all public institutions can only buy advertising space through NKOH; thus, the system has been centralised. Under the scheme, NKOH issues a public procurement notice and concludes a framework agreement with the winning media agencies, and the entire public sector communication activity is conducted through these framework agreements. The specificity of the situation is that the NKOH has not concluded an agreement with a media agency that is well-known among commercial advertisers but with an operator that is demonstrably close to the government.

It is not possible in this paper to analyse in depth the history of NKOH's tenders and framework agreements, but in any case, since 2018, the New Land Media – Lounge Design consortium has been NKOH's only contracting partner. Both companies in the consortium have the same owner, Gyula Balásy, which puts one player in an extremely strong position in the media agency market.

Distribution companies are very important in the ecosystem. This is another area where changes have been made in recent years. In the television broadcasting market and, in parallel, in the internet service-providing market, ownership concentration has increased significantly. The government-owned 4iG had already acquired stakes in the broadcasting companies Antenna Hungária and Digi, but the real acceleration occurred in January 2023. The Hungarian state and 4iG acquired Vodafone Hungary, which has 3.8 million subscribers, leaving two large groups in the previously relatively diverse Hungarian market: 4iG and the German-owned Magyar Telekom. This gives the pro-government group of investors and the state itself a very strong position in the infrastructure through which content consumption and communication take place (Madzin, 2022).

The importance of the ecosystem can also be observed in the print market. There are two major players in the field of the subscription distribution of newspapers: the state-owned Magyar Posta and MédiaLOG-DMHM, a subsidiary of Mediaworks and thus part of the government-owned KESMA. Of the two players, the latter is increasingly dominant: In 2021, Magyar Posta stopped delivering daily newspapers to the door, and in 2023, it stopped selling printed newspapers in post offices. This makes access to newspapers more difficult, especially in smaller municipalities, and gives a company close to the government a particularly strong position in newspaper distribution.

In the market for printed sheets, printing itself came under strong control, with KESMA taking over the printing plants capable of producing large numbers of sheets. The weekly Magyar Hang, which was launched in 2018 and is critical of the government, has to be printed in Slovakia because the publisher could not sign a contract with any printer in Hungary.

PRESSURE ON INDEPENDENT MEDIA

The capture of the Hungarian media and market distortion not only involves strengthening the pro-government media companies but at least as important is the weakening of independent media. This includes putting pressure on independent actors, initiating systematic smear campaigns and making journalistic work more difficult.

Legal proceedings, harassment by public authorities

In Hungary, the most recent and most worrying instrument of pressure is the Sovereignty Protection Act² passed in 2023, from which the Sovereignty Protection Office (SPO) was set up as a result. Editorials, professional organisations and NGOs alike have expressed their concern about the law and in 2024, the SPO launched its first investigations. A report published by the SPO about the investigative portal Átlátszó included untruths that led the publisher to sue the SPO (Átlátszó, 2024).

In the coming years, it will become clear what tools the SPO will have to deal with the media and civil society: will it try to influence them primarily through intimidation and the production of defamatory material, or will its activities have even more serious consequences?

Hungarian newsrooms already have experience of what it is like when the state treats journalists as enemies and tries to obstruct their work by any means. The Pegasus scandal revealed that the Hungarian secret services had used spy weapons against journalists and a media owner. A series of articles launched in the summer of 2021 uncovered the Hungarian threads of an international investigation, revealing the names of those involved, including well-known Hungarian investigative journalists (Panyi-Pethő, 2021). The use of intelligence tools not only directly affects journalists' work but also has an indirect effect. Sources will become very cautious if they do not believe that meetings and conversations with journalists will really remain secret. This makes it more difficult to obtain information and uncover cases.

A less serious practice, but one that nonetheless has a major impact on the lives of editorial offices, is the filing of lawsuits asking for corrections. This is, of course, something that a media company must accept and, in line with professional journalistic standards, strive to avoid. It is also possible, however, that lawsuits may be brought without any basis, with the express purpose of

² Act LXXXVIII of 2023 on the Protection of National Sovereignty

draining a journalist's resources so that they cannot continue to work as a journalist. A legendary case was when, following a series of articles on parking-related corruption activity described in the 444 online portal, the Municipality of Ferencváros challenged the articles on 50 points. In the end, the paper was ordered to make three corrections, but none of them related to the substance of the articles. Dániel Ács, a journalist who investigated the parking corruption, summarised the aim of the lawsuits as follows. "Rather, it was to wear down, distract and cover up. They calculated, correctly by the way, that the municipality, courtesy of the taxpayers of the district, could mobilise orders of magnitude more capacity, more financial resources, many more lawyers and PR professionals with experience in remedial cases than 444" (Ács, 2018).

Stigmatisation of journalists

The hostile portrayal of the independent media was already present in the ruling party's communication before the Sovereignty Protection Act: independent journalists are often called foreign agents and traitors. The "Sorosing" started as early as in the 2010s, but in recent years independent media have more commonly been referred to as the "dollar media".³ Research from the 2024 election campaign shows that 47 per cent of political ads on Facebook and Google conveyed a hostile narrative, including one that was clearly identified as aimed at discrediting government critics, including journalists. It is noteworthy that the majority of political ads were not placed by political parties or politicians, but by government-linked organisations and pro-government media (Political Capital et al., 2024).

Despite years of incitement, Hungary is still a fundamentally safe place for journalists: there are no physical attacks on journalists, and there have been no murders of journalists. There are examples of harassment and threats against journalists, and of course, these also have an impact on journalistic work.

The most comprehensive study on the subject is by Tófalvy (2022), although his paper is a summary of Hungarian research originally published in 2017. In total, 20 online journalists (14 men and 6 women) were interviewed in the form of in-depth interviews and focus group discussions. The article distinguishes

3 On the website of the pro-government daily *Magyar Nemzet*, the first article under the tag "dollarmedia" was published on 13 December 2022, and by January 2025, altogether, 81 articles had been given this tag. Origo, the pro-government news site, published its first article with this tag on 12 December 2022, and since then, the counter has reached 91.

eight basic forms of online aggression: rhetorical aggression, trolling, bullying, threats, public shaming, cyber-attack or hacking, invasion of privacy and malicious social media activities. The most common types of harassment encountered by the journalists surveyed were rhetorical aggression and bullying, which almost all respondents had experienced. It is noteworthy that 40% of the respondents had experienced threats. Attila Varga, a former journalist for Index, has received numerous threatening messages in the course of his work, “including death threats and those in which his child was threatened or his wife was threatened with sexual violence”.

Harassment can affect journalists in three ways. First, there is a kind of chilling effect (even self-censorship), which tends to make both readers and journalists avoid interaction and dialogue. The second effect is the so-called desensitisation effect, i.e. journalists gradually become desensitised to offensive and aggressive messages. A particularly damaging consequence of this is that totally unacceptable behaviour becomes the norm and is accepted both by journalists (“it’s part of the job”) and by the social environment. The third main problem is the intensity of aggression against traditionally disadvantaged social groups, which, in the case of this research, involves violence against female journalists. Women are more often the target of harassment than male journalists, and this often manifests itself in threats of sexual violence (Tófalvy, 2022).

There is good reason to believe that the situation has deteriorated rather than improved in recent years. A memorable story was when the pro-government media published scurrilous articles one after the other about Gábor Miklósi, a journalist for Index, because he did not stand up before the Hungarian national team’s match while singing the song *Nélküled*, a favourite song of football fans. A few days later, antisemitic messages appeared on the streets of Budapest, with a photo of Miklósi and another Index journalist, András Dezső (Narancs.hu, 2019).

It is easy to see that such harassment is very damaging, even if it has not yet led to a direct physical attack. Journalists who suffer harassment are affected by what happens to them; it takes time and energy to deal with the harassment, and they have to cope psychologically.

Obstruction of journalists’ work

Editors have to face the fact that doing journalistic work means more and more legal work and, at the same time, higher legal costs. A common case of this is when a public institution refuses to disclose public interest data requested by a journalist, and the journalist pursues the matter through legal action. This

incurs both time costs, as it can take years to extract the data and financial costs for media companies.

It is now almost a truism that journalists' work is hampered in many ways by the ruling party. Government politicians, except in some very special cases, do not give interviews, ministries do not answer questions sent to them, and employees of institutions (including schools and hospitals) are not allowed to provide information. It is common for independent media to be denied access to important events, including press conferences (TASZ, 2020). An emblematic example of the difficulties journalists face is the fact that during the COVID-19 epidemic outbreak, journalists were denied access to basic information, and essential data was not available. The situation was also special because, in that situation, it would have been in the public interest to share information: it was not only a matter of controlling public power but also of helping fight the epidemic and protect human lives.

In recent times, editorial teams have also had to face new challenges. Cyber-attacks against independent media are a regular occurrence, often rendering websites inaccessible. Readers perceive this as a passing inconvenience, but the situation is more serious, as publishers have to increase the resources they devote to IT security, which, of course, means increased costs. The situation is so serious that the International Press Institute (2023) has already identified such a series of attacks as a form of digital censorship.

CONCLUSION

The transformation of the Hungarian media system in the 2010s is a sad example of how a development path can be reversed. At the time of regime change, it seemed self-evident that democratic institutions and a market economy would provide a framework for long-term stability and prosperity in Hungary.

Today, both in professional discourse and in public debate, it is often said that the current Hungarian media system resembles, in many respects, the public sphere of the communist era. In addition to the obvious differences, such as the state of technology, it is important to point out that while the communist party controlled the public through administrative bans and direct intervention and censorship, today, it is much more characterised by market intervention.

These market interventions can take many forms. Some of them guarantee access to resources for certain actors, such as the financing of public service media, the tendering practice associated with radio frequencies, the ownership expansion of political investors or state advertising spending. These are solutions

similar to those found in other countries, but the Hungarian situation is more specific in terms of the degree of intervention and the market-distorting effect.

There are also instruments that intervene in market mechanisms in ways that are not at first glance obvious and, therefore, play a much smaller role in both the literature and the policy discourse. A good example of this is the way in which mergers in the media market are authorised or how intervention in the media ecosystem is allowed. These are less visible but still crucial instruments of contemporary Hungarian government media policy.

Last but not least, there is the shrinking independent media. The remaining independent players are inherently at a competitive disadvantage because of the unjustified economic and competitive advantage that pro-government players enjoy, and fair competition is therefore being undermined. Moreover, political, legal or even psychological pressures further weaken the independent media simply by tying up corporate and individual resources and distracting attention from the core activity of journalism.

The specificity of the Hungarian media system is partly due to the fact that the tools presented here were built in an unparalleled short period of time; a decade was enough to change the media landscape. The tools would not individually be suitable for transforming the media system, but together, they prove to be sufficient and very effective. The captured Hungarian media system as a whole is no longer serving the public good but is representing private interests by placing a large part of the corporate sector under the influence of a politically well-defined group.

Another peculiarity of the transformation is that it has taken place within the European Union. It is difficult to say why the EU institutions did not use the tools at their disposal, but there is no doubt that no meaningful attempt was made to prevent the Hungarian media market from being captured. The complexity of the system and the lack of clarity about the real purpose of the individual steps that were taken in many cases may have played a role in this.

For the time being, no one can say when there will be an opportunity to transform the current media system. Sooner or later, that time will come, but for the time being, there is no real professional debate on the purpose, the main elements thereof, or the way to implement a new media policy. Accepting the specificities of Hungary (small market, isolated language), it would be necessary to outline the contours of a media system that is resistant to future attempts at capture and capable of defending the fundamental values of democratic public life.

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