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General overview

Uniquely among the European Union countries, two parallel media systems emerged in Hungary in the 2010s and the early 2020s: the state and the market media systems, the former depending on the government and the latter preserving its independence (Bajomi-Lázár & Horváth, 2023/2025; Polyák & Urbán, 2024).

After the landmark victory of the Fidesz/Christian Democrats party alliance headed by Viktor Orbán in the 2010 legislative elections, parliament passed a media act that established a new regulatory agency (the National Media and Telecommunications Authority, NMHH) with a governing body (the Media Council), whose members and chair were nominated by the ruling parties and the President of the Republic, respectively (the President being also elected by the government majority). In the next fifteen years, the successive Orbán Governments, re-elected in 2014, 2018, and 2022, pursued a favouritist media policy, allocating media resources – such as broadcasting licences, state funds for public service broadcasting and state advertising – to businessmen informally associated with the ruling parties and running pro-government production companies and outlets (Bajomi-Lázár, 2017; Bátorfy, 2019; Polyák, 2022).

Throughout the 2010s and the early 2020s, most independent outlets were short of resources, and many were either closed down or acquired by actors supporting the government. For example, the national commercial channel TV2 was sold in 2015 to Andy Vajna, then the government's commissioner in charge of the film industry; the broadsheet *Népszabadság* ceased publication in 2016; the news site *Index.hu* was bought by the Hungarian businessman and media manager Miklós Vaszily in 2020; and the news and talk station *Klubrádió* lost its terrestrial broadcasting license in 2021 and went online (Urbán et al., 2017; Benedek, 2024).

Two media systems and two journalistic cultures in one country

The outlets of the state media system are centrally coordinated and echo the government's views. They evince ideological homogeneity, uniformly giving voice to right/conservative views, albeit some newsrooms (such as *Mandiner.hu*) take a more radical, while others (such as *Index.hu*) a more moderate, stance. Most of these news organisations make a profit based, mainly, on state advertising. By contrast, the outlets of the market media system offer a critical account of the government's policies and are ideologically diverse – albeit left/liberal voices such as for example the news site *Telex.hu*, the print weekly *Magyar Narancs* and the online only station *Klubrádió* have a clear majority, while right/conservative ones are scarce, the latter including the print weekly *Magyar Hang* and the news and current affairs site *Válasz Online*. Most of these outlets struggle to survive, as even private advertisers are reluctant to place advertisements in them – even though several newsrooms have successfully applied for various grants allocated by foreign organisations promoting independent journalism (Bajomi-Lázár & Horváth, 2023/2025).

Journalists in the two media systems follow different logics: those in the state system subscribe to collaborative journalism, while those in the market system take a monitorial position. Representatives of the two media systems regularly accuse each other of fake news dissemination and mutually refer to the outlets belonging to the other media system as the “propaganda press.” Those of the state system occur to have little autonomy (albeit these newsrooms are lacking transparency and researchers have little knowledge about their inner mechanisms, as their journalists usually refuse interview requests), while those in the market system have high levels of autonomy (Bajomi-Lázár & Horváth, 2023/2025).

Ownership patterns and political parallelism

In the state media system, a high level of ownership concentration prevails, with outlets converging around two major hubs: a nominally public service conglomerate (Media Services Support and Asset Management Fund, MTVA) and a private foundation (Central European Press and Media Foundation, KESMA). MTVA was established in 2011 with its Director-General appointed by the Media Council; it includes the eight channels of public service television and the eight channels of public service radio, as well as the Hungarian Wireless Agency (MTI) that provides news to outlets free of charge. KESMA was established in 2018 when private media owners, informally associated with the incumbents, donated their media companies overnight and without any compensation to the foundation; it coordinates nearly 500 outlets, including print, broadcast and online media (Polyák, 2022; Polyák & Urbán, 2024).

In the market media system, the level of ownership concentration is low, as most outlets are owned by various domestic businessmen and, in some cases, some of the newsroom staff, with the notable exceptions of RTL (see next section for details).

In the state media system, the news agenda and frames of outlets are largely identical with those of the Fidesz/Christian Democrats, i.e. high-level political parallelism is manifest. In the market media system, outlets show little or no support for the opposition parties, i.e. the level of political parallelism is low. Overall, hence, the Hungarian media landscape evinces asymmetric parallelism (Benedek, 2024).

Some outlets are difficult to place in the framework of the two media systems described above. Such is the case of news organisations either informally or overtly associated with the opposition parties, including the YouTube-based broadcaster *DK TV* and the news site *Nyugati Fény*, both echoing the agenda and frames of the left/liberal Democratic Coalition party, the major opposition force until 2024. Another, fairly new, player is *Kontroll.hu*, a news site supporting the centre-right Tisza Party, Hungary's new opposition force that emerged in 2024 and became the major challenger of Fidesz and the Christian Democrats in 2025, as the publisher of the outlet, Márton Magyar, is the brother of Tisza Party chair Péter Magyar, and the outlet's agenda and frames are highly similar to those of the party. These outlets are independent from the governing parties, yet they evince high-level parallelism relative to some of the opposition parties. Their weight, however, is negligible, as none of these news organisations is among the ten most popular information sources (cf. Reuters, 2025).

Variations across market segments

The two media systems are about equal in size, yet different market segments evince a great deal of variation. In the segment of nationwide radio stations, the outlets of the state media system, including *Kossuth Rádió* and other nominally public service stations (MTVA), and the commercial station *Retró Rádió* (KESMA), are in a monopoly or near-monopoly position. Likewise, in the segment of local radio stations, all outlets are controlled by KESMA, except in Budapest and its agglomeration where other stations are also available, including the independent community broadcaster *Tilos Rádió* (Tilos Cultural Foundation) and *Spirit FM* (Faith Church). In the segment of regional dailies, the situation is similar: all of Hungary's 19 counties having one daily outlet, respectively, published by KESMA (Polyák & Urbán, 2024).

In some other market segments, however, independent outlets have a dominant position: in the television sector, *RTL* (Magyar RTL Plc., a subsidiary of the multinational RTL Group), known for its

high-quality evening news bulletin, is the most popular outlet with a 36 per cent weekly reach, followed by the pro-government TV2 (TV2 Media Group Plc., headed, since the death of Andy Vajna in 2019, by Miklós Vaszily) with 24 percent, and ATV (Faith Church) with 19 percent. Similarly, in the online sector, the independent news site *Telex.hu* (Telex.hu Plc.) is the most popular information source with a 28 percent weekly reach – albeit it is closely followed by the pro-government *Index.hu* (Index.hu Plc., 27%), other important players including the independent *24.hu* (Central Media Group Plc., 24%), *444.hu* (Magyar Jeti Plc., 23%), *hvg.hu* (HVG Kiadó Plc., 19%), *rtl.hu* (19%), and the pro-government *Origo.hu* (KESMA, 18%) (cf. Reuters, 2025).

Yet other market segments are heterogeneous. That of broadsheets is divided between the pro-government *Magyar Nemzet* (KESMA, no circulation data available) and the independent *Népszava* (owned by the Hungarian businessman Tamás Lesztinger, 12,000 copies in 2023, more recent data being unavailable). Similarly, the market of nationwide tabloid dailies is controlled by pro-government companies, including *Bors* (KESMA, over 20,000 copies) and *Blikk* (Indamedia, nearly 40,000 copies); of these, the latter was owned, until October 2025, by Swiss Ringier and then sold to a company associated with Lőrinc Mészáros, a long-time friend of the Prime Minister (Média 1, 2025). The market segment of print weeklies is also heterogeneous: even though the leading outlet is the pro-government *Szabad Föld* (KESMA, nearly 33,000 copies in 2023), and there is another pro-government outlet called *Magyar Demokrata* (Demokrata Kiadó és Vagyonkezelő Plc., 7,000 copies), these are outnumbered by independent weeklies, including *HVG* (Heti Világgazdaság Kiadói Plc., 23,000 copies), *Magyar Hang* (Magyar Hang Foundation, no data), *Élet és Irodalom* (Irodalom Ltd., no data) and *Magyar Narancs* (Magyarnarancs.hu Lapkiadó Ltd., no data) (Polyák & Urbán, 2024; NMHH, 2024).

Influencers

The rise of online media ‘personalities’ or ‘influencers’ providing news and views to audiences and forming an “alternative media ecosystem” beside professional news organisations has become a global trend in recent years (Reuters 2025: p. 5). This is also the case in Hungary where many YouTubers, TikTokers and podcasters discussing political events online emerged in the early 2020s, and the government has shifted its focus from legacy to social media platforms to improve its communication (Political Capital et al., 2024).

The world of online influencers is as divided as that of traditional news organisations, as the main cleavage lies between pro-government and independent voices. Pro-government influencers are well organised and converge around two hubs: the Megafon Digital Influencer Centre (Megafon Digitális Inkubátor Központ Ltd.), established in 2020, and Fight Club, a movement personally launched by PM Viktor Orbán in May 2025. The latter aims to train thousands of micro-influencers active on social media platforms – its operations, however, are lacking transparency and their political impact may not be assessed yet. By contrast, the former has a well documented history. According to Megafon’s mission statement, it trains “digital freedom fighters” who counter “the dominance of the left/liberal mainstream” and runs the YouTube channel *Patrióta*. It is preoccupied with the dissemination of short videos on social media, mainly Facebook, Hungary’s most popular platform that 43 per cent of the population uses to access news (cf. Reuters, 2025). According to a recent focus-group study, nearly all Facebook users have met Megafon’s contents, mostly unaware that it is hidden political advertising; in the first half of 2024, the organisation spent almost 2.2 million dollars on social media ads (see Political Capital et al., 2024). Even though Megafon claims to be independent, it has been found to be relying on state funding. Many of its narratives are based on exaggerated, distorted or untrue fact statements and selective

truths, mobilising negative emotions such as fear; as it distributes content supporting the government's policies and criticising the opposition, it has been labelled "the ruling party's outsourced campaign team" (Horváth et al., 2025, p. 5). Megafon's key influencers often engage in character assassination, targeting opposition politicians, independent public intellectuals and the liberal leaders of the European Union.

The most popular independent influencer is Márton Gulyás whose YouTube-based news channel *Partizán* (Partizán Rendszerkritikus Tartalomelőállításért Foundation) mixes journalism and political activism; it currently has 580,000 subscribers (by comparison, *Patrióta* has 244,000 subscribers). Another independent influencer is stand-up comedian-turned-political commentator Edina Pottyondy whose YouTube channel has 343,000 subscribers. She is followed by political commentator Róbert Puzsér's YouTube channel with 263,000 subscribers. All the above take a highly critical stance toward the government.

While the influencers of the state media system are mainly funded by public money, the influencers of the market media system rely on commercial advertising. The messages of the former reach the public mainly owing to paid ads, while those of the latter spread organically and virally.

Funding

The roots of the favouritist distribution of state advertising – i.e. advertising allocated by various state and government agencies, including ministries, municipalities, public enterprises and cultural institutions with the intention of boosting positive coverage of the government's policies and silencing negative reporting – go back to before the Orbán Government took office in 2010. Yet the amount of state advertising spending grew considerably throughout the 2010s, protecting pro-government outlets from the challenges of market competition (Bátorfy & Urbán, 2019). By the late 2010s, many outlets associated with the incumbent parties earned 75–80 per cent of their total advertising revenues from state sources, albeit about one fourth of the total state advertising budget was allocated to independent outlets (Bátorfy, 2019). In 2021 for example, the latest year with available data, the single most important advertiser in Hungary was the Prime Minister's Office (76 million Euros), followed by the state-owned gambling-service provider Szerencsejáték Plc. (24 million euros) and the Hungarian Tourism Agency (21 million euros) (Annual Report, 2022).

Thus, state advertising has been instrumentalised as a 'carrot and stick' policy means to reward loyal outlets and to punish critical ones – particularly as the financial and economic crisis and the advent of social media platforms in the late 2000s reduced the amount of advertising revenues available for traditional news organisations.

Regulation

In December 2024, Hungarian parliament adopted Act LXXVIII on the Suppression of Online Aggression that came into force on January 1, 2025, under which it is a criminal offense to publicise social media content that incites violent acts. Based on this law, at least one individual has been arrested by the police for a comment posted under a video shared by the Prime Minister, suggesting that "8 millimetres [i.e. an 8-millimetre bullet] would take care of him [i.e. the Prime Minister] like it did in Romania back in the day [i.e. when dictator Ceaușescu was executed in

December 1989].” The police searched her flat and copied the data stored on her computer. After the interrogation, she was released from custody and now awaits her trial (Police, 2025).

In the spring of 2025, a new bill was introduced to parliament (Bill T/1192 on the Transparency of Public Life). Once passed, the law would empower Hungary’s Office for the Protection of Sovereignty to list all organisations that have received funding from abroad (including from the European Union) and that have the ability to influence public opinion, in the event they “threaten” national sovereignty. Activities imposing a threat would include the negative portrayal of Hungary’s democratic system, the unity of the nation, the primacy of marriage, the family and the biological sexes, as well as the Christian culture of the country, among other things. Once listed, those organisations may no longer receive any funding from another country and would lose their right to collect the one percent of the personal income tax available for non-governmental organisations, without a right to appeal. If they do accept foreign funding, the tax authority may oblige them to pay twenty-five times the amount of the unauthorised payment (Átlátszó, 2025). If passed, the law would severely undermine the funding of independent outlets that in part rely on grants allocated by foreign organisations promoting independent journalism. Owing to criticisms both inside and outside Hungary, however, the parliamentary debate of the bill was delayed; whether it will be re-introduced later is not known yet.

Ownership transparency

Data on news media ownership in Hungary is easy to find. In addition to the academic literature that follows closely and regularly the changes in ownership, official data bases, including the National Register of Companies (nemzeticetar.hu) and the E-Company Register (e-cegjegyzek.hu), offer data free-of-charge – albeit the information they provide is limited. By contrast, the private database Opten (opten.eu.hu) offers detailed information for a moderate fee – academic researchers, however, may obtain a one-month subscription free of charge.

Political consequences

In Hungary’s deeply divided media landscape, the outlets belonging to the state and the market media systems, including both traditional news organisations and online influencers, offer highly different accounts of the day’s events (Kiss, 2024, Bodor et al., 2025). Owing to the emergence of two parallel narrative universes, audiences are also divided: according to a recent study, 59 percent of the supporters of the Fidesz/Christian Democrats party alliance hold that opposition voters are “brainwashed” and 63 percent of the supporters of the opposition believe so about the voters of the incumbent parties. Likewise, 85 per cent of the opposition supporters are concerned that the government-affiliated media disseminate “propaganda” rather than accurate information and 58 percent of the Fidesz/Christian Democrats voters think that independent media are propaganda tools (Policy Solutions, 2022).

This suggests that the co-existence of two media systems may have contributed to the toxic polarisation of Hungarian society (cf. Patkós, 2016) – even though the political cleavages dividing Hungarians go back to at least the 1930s and are rooted in reasons beyond the media (cf. Merziger et al., 2020). Strong pro-government media are also a part of the “uneven political playing field” (see Bozóki & Hegedűs, 2018: p. 1177) that emerged in the 2010s and may have played a part in the repeated electoral victories of Fidesz and the Christian Democrats throughout the 2010s and the early 2020s.

Even so, independent media in Hungary still have the means to uncover abuses of power and shape public opinion and voting behaviour. Most notably, the independent news site *444.hu* exposed that President of the Republic Katalin Novák had pardoned a convicted individual involved in a sex-abuse cover-up in a children's home (*444.hu*, 2024), leading to protests of an unprecedented scale, the resignations of both the President and Minister of Justice Judit Varga in February 2024, and the spectacular rise of Péter Magyar, later Chair of the Tisza Party, the main challenger of the incumbents. In fact, Magyar, the former husband of Varga, got nationwide recognition owing to an interview published on the independent YouTube channel *Partizán* in February 2024 and seen by 2.7 million people in a country of less than ten million (*Partizán*, 2024). Likewise, more than 3.3 million people have seen 'The Dynasty,' a video documentary shared in early 2025 on YouTube by the small investigative site *Direct36.hu*, detailing how the family members of the Prime Minister had gotten rich owing to public procurement tenders (*Direkt36.hu*, 2025). According to a representative survey by the independent pollster Medián published in June 2025, Tisza had a 51 per cent share among those who said they would vote at the next elections, as opposed to the 36 per cent share of the Fidesz/Christian Democrats party alliance (*Medián*, 2025), suggesting, for the first time in fifteen years, that the incumbents may lose the legislative elections forthcoming in the spring of 2026.

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