



AUTHORS: ANDRÁS BÍRÓ-NAGY – VANESSZA JUHÁSZ – ÁRON SZÁSZI – ATTILA VARGA

As a think tank committed to Hungary's European integration, Policy Solutions has always regarded the monitoring of the political and policy relations between Hungary and the European Union as one of its key responsibilities. In recent years, we have made it a priority to publish research that digs deeper than the standard “remain or leave”-type of surveys about Hungarians' attitudes towards the EU. Instead, we have undertaken more nuanced investigations of how Hungarians see their country's future in the European Union. The present publication, which also marks the 15th anniversary of the founding of Policy Solutions, was drafted in the spirit of building on this worthy tradition.

Our study will review what the EU means to Hungarians in 2023, what they regard as the most important benefits and disadvantages of membership, and how they assess the economic balance of EU membership on the whole. We put a special focus on the Hungarian voters' assessment of the processes taking place at the EU level: what values should the EU stand for and what role should it play globally in the future? In order to find out what kind of Europe Hungarians want, we also asked them what new member states they would admit into the European Union. We further examined in which policy areas Hungarians would want to give the EU more responsibilities, and which policy areas they would prefer to keep in the exclusive control of the member states. Furthermore, our survey sought to gauge how deep the imprint of the government's eurosceptic campaign is, and how pronounced the fears and grievances in Hungarian society are concerning the EU. Our previous research on the subject also allows us to capture the changes over time for many of the questions we looked at.

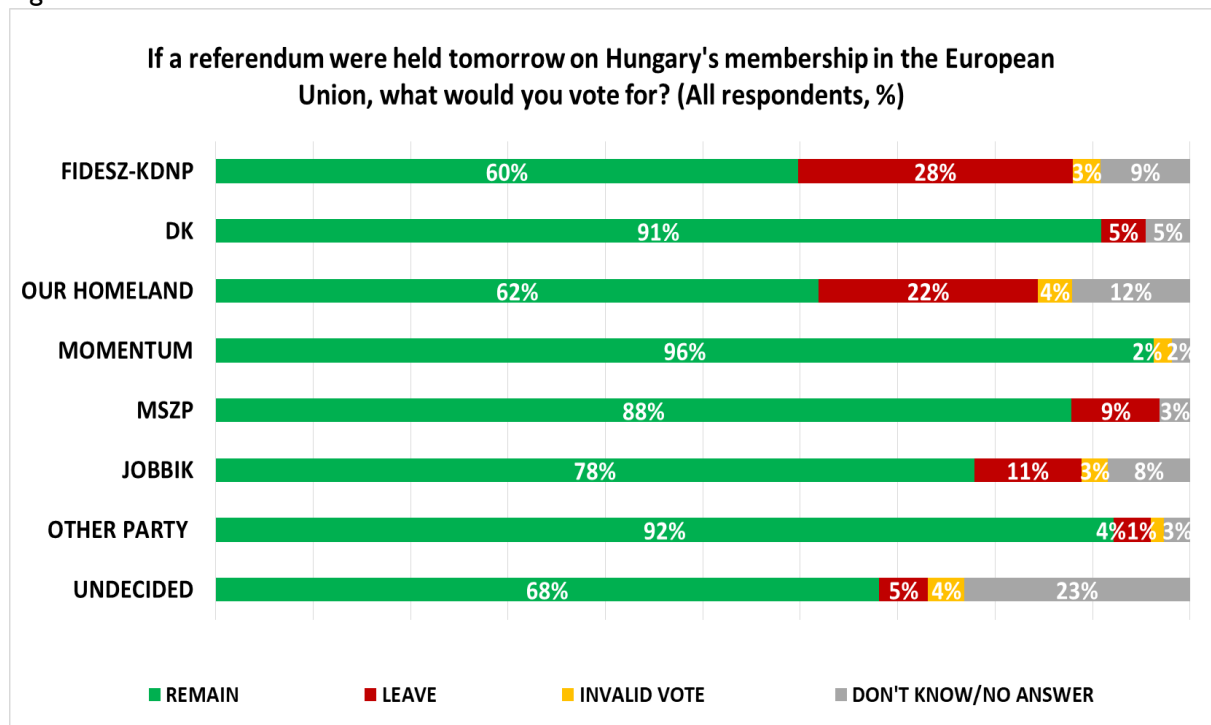
As a foundation for the analysis, we performed a public opinion survey between 28 April and 5 May 2023. Our partner in conducting the survey was Závecz Research. The survey was administered in the form of personal interviews, and the questions were presented to 1,000 persons who were representative of Hungary’s adult population in terms of age, gender, educational attainment, and the type of municipality they reside in. The study was realised with the support of the Friedrich-Ebert-Stiftung Budapest.

Support for Hungary’s EU membership consistently remains over 70%

As of 2023, 72% said that they would vote for Hungary to remain in the EU if a referendum were held on the issue. All of the surveys performed by Policy Solutions in the past two years have shown at least 70% support for EU membership, and our most recent study confirms that despite the Orbán government’s Eurosceptic campaigns, the public’s commitment to EU membership has not been shaken. Only a very small segment of the Hungarian public (13%) would vote for their country to leave the EU.

Among the supporters of the various parties, the voters of Momentum (96%) and the Democratic Coalition (91%) were most likely to indicate that they would vote for Hungary to remain in the EU; 88% of MSZP voters also agreed (Figure 1). By contrast, among the supporters of the ruling party Fidesz (60%), and the far-right Our Homeland (62%), support for EU membership is around 60%. At the same time, over 20% of the supporters of these two parties would opt for a HUXIT (28% of Fidesz voters and 22% of Our Homeland supporters).

Figure 1.





The more we know about the EU, the more likely we are to prefer retaining our membership

The levels of knowledge about the European Union are having a substantial impact on respondents' likelihood of supporting Hungary's EU membership. Based on the results of our EU knowledge test, as we approach higher levels of knowledge about the EU, support for membership increases, while the share of those who are undecided about the HUXIT question declines. **Roughly three out of four persons with a high (77%) or medium (74%) level of knowledge would choose to stay in the EU. By comparison, in the group of those with a low level of knowledge, only half would opt to stay in the EU in a hypothetical referendum.** This pattern was also reaffirmed by multivariate logistic regression models. As compared to respondents whose knowledge about the EU is deficient, those with a high level of knowledge are significantly more likely to be pro-EU and less likely to be undecided about membership. At the same time, the level of knowledge has no significant impact on the support for a HUXIT. We had also looked at the relationship between the levels of knowledge about the EU and the support for EU membership two years earlier: in 2021, we also found a positive relationship between the support for membership and the level of knowledge about the European Union.

The meaning of the EU in Hungary: EU funds, community, free movement

Our results confirm that when the EU is mentioned, Hungarians primarily think of funding. **For nearly a third of respondents (29%), the positive impact of the EU on the Hungarian economy is the first thing that comes to mind when the European Union is mentioned.** When asked to say what they first thought about the EU without being given prompts, respondents frequently mentioned the developments realised with EU funds, the financial support, and the economic progress realised as a result. **This has been a very stable attitude in Hungarian society: EU subsidies topped the list in 2019, 2021, and 2023.**

The attitudes towards the EU as a community came in second with 27% of responses. In this context, respondents referred to the notions of belonging, extending assistance, cooperation and European unity. Two years ago, respondents had been seven percentage points less likely to mention that we belong to the same community; this increase has led to the idea of community moving into second place from the fourth spot it had previously occupied. **The free movement provided by the Schengen Agreement and the opportunity to travel was an important factor for nearly a quarter of Hungarians (23%).** The opportunity to take jobs or study abroad also continues to rank highly (18%). **On the whole, we found that Hungarians tend to have predominantly positive views of the European Union. For the respondents, the most important benefits of our EU membership are the economic development achieved thanks to the EU funds, the concept of a "Europe without borders," and the sense of belonging.**

Hungarians primarily view EU membership favourably because of the financial benefits

In line with previous research conducted by Policy Solutions, there continues to be a widespread agreement in Hungarian society that the most important benefits of our membership are the opportunities stemming from the funds provided by the EU and the concomitant economic development: 54% of Hungarians mentioned these among the top three benefits. The elimination of physical borders and the Schengen Agreement providing free movement came second (30%), while the opportunity to work and study abroad (26%) rounded out the top three. **This meant that the three most frequently mentioned benefits were the same as two years earlier.** The only change is that Schengen and working/studying abroad have



switched places, with the former coming in second in the most recent survey and the latter dropping from second to third since 2021.

The biggest drawbacks of EU membership: excessive regulation, weakened national sovereignty, migration, freezing of EU funds, and sanctions policies

We also examined which aspects of EU membership people tend to view as the biggest disadvantages of being part of this community. **A fifth of the respondents (22%) emphasised excessive regulation.** Fifteen percent said that **Hungary's national sovereignty declined** as a result of EU membership (and they unequivocally referred to this as one of the disadvantages). **Migration** came in third (14%), in a dead heat with those mentions that referred to the **European Union's criticisms of the Hungarian government and the freezing of EU funds**, as well as the **danger of drifting into a war and the negative repercussions of the sanctions.**

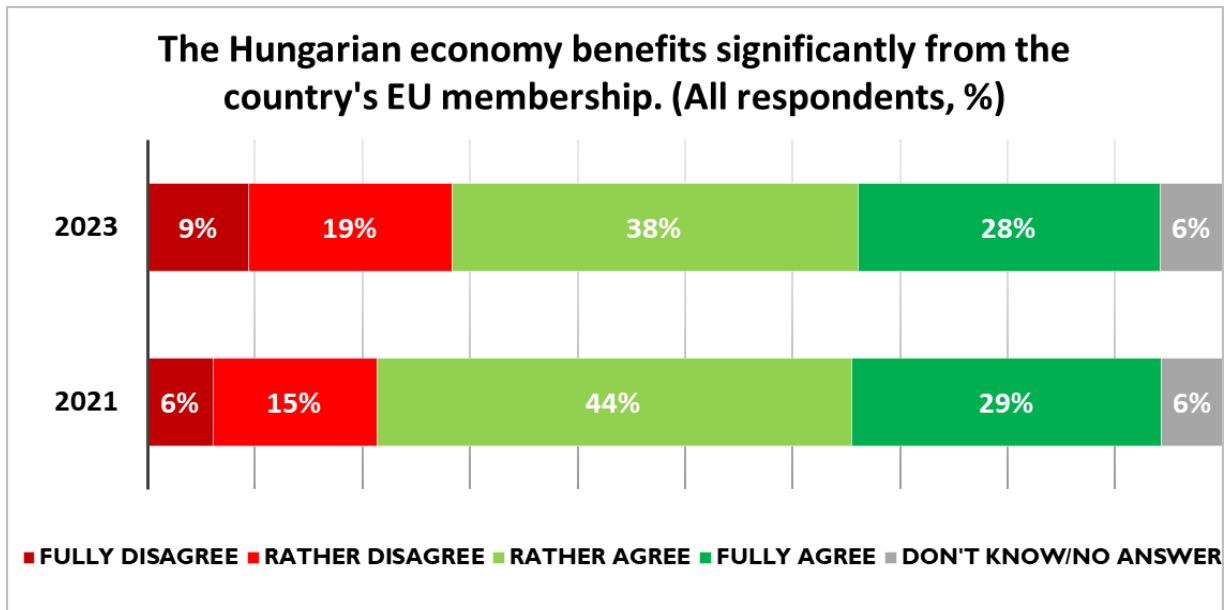
Looking at the most important trends, it is worth highlighting that excessive regulation finished first in both 2021 and 2023. At the same time, its mentions have declined significantly (from 30% in 2021 to 22% in 2023). This primarily owes to the fact that **over the past two years, the EU's sanctions policy and the danger of war have come to figure heavily in the list – not independently of the government's intense communication about this issue. The freezing of EU funds and the escalation of relations between the EU institutions and the Hungarian government were also mentioned more frequently than in the previous survey.** As these issues moved into the foreground, migration has been increasingly relegated to the background: while in 2019 Hungarians were most likely to mention migration as a drawback of EU membership, by 2021 this issue had dropped to second place, and by 2023 it was only in third, in a dead heat with the relations between the Hungarian government and the EU.

The slow erosion of the EU's economic legitimacy

A majority of Hungarians (50%) perceive that their country receives more money from the EU budget than it contributes to the latter. At the same time, 36% of respondents assessed that Hungary has become a net contributor to the EU budget. As compared to two years earlier, in 2023 we found a seven-percentage-point increase in the share of those who believe that Hungary is a net contributor to the EU budget, while there was a three-percentage-point decline in the proportion of those who believe that this is not the case. Half of the ruling Fidesz party's voters believe that Hungary has become a net contributor in recent years. The opposite view, namely that Hungary receives more funds from the EU than it contributes to the latter, was held by the respective majorities of the supporters of the six opposition parties that had run jointly in the 2022 general election, the far-right Our Homeland party, and those without a partisan preference.

Two-thirds of Hungarians (66%) believe that our economy profits substantially from Hungary's EU membership, while 28% of respondents disagreed with that assessment (Figure 2). Nevertheless, on this question, too, our data indicate a slow erosion of the EU's economic legitimacy: as compared to two years earlier, in 2023 respondents were seven percentage points less likely to believe that our EU membership pays off economically. In the same period, there was a concomitant growth in the share of those who are sceptical about the economic benefits of membership.

Figure 2.

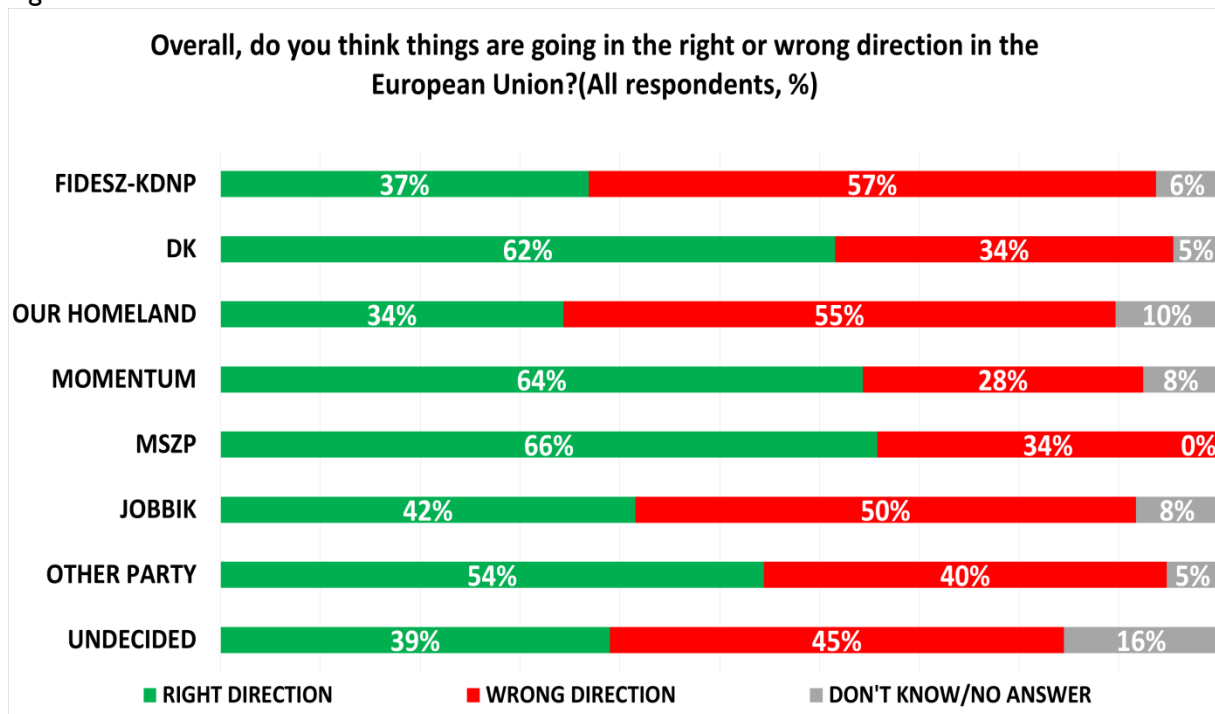


A country divided: Is the European Union headed in the right or wrong direction?

Hungarian society is staunchly divided on the assessment of the course that currently prevails in the European Union: 44% said things were going in the right direction, while 47% said that the EU was headed in the wrong direction. This marked only a slight movement in the share of those who thought things were going fundamentally well in the EU (46% in 2021 and 44% in 2023), but we found a steep increase in the share of those who take a negative view of EU processes: this number surged from 38% in 2021 to 47% in 2023.

The negative view of the direction of the EU was most typical of the voters of the right-wing parties, the ruling Fidesz (57%), the far-right Our Homeland (55%), and the former far-right party Jobbik (50%), which had been part of the opposition alliance in 2022. By contrast, the supporters of centrist and centre-left parties were far more likely to take a positive view of the EU's overall direction: the majority of MSZP (66%), Momentum (64%), and Democratic Coalition (62%) voters assessed that the EU is headed in the right direction overall (Figure 3).

Figure 3.



What the EU stands for today: Defending democracy, free movement, rising standards of living

In 2023, Hungarians were most likely to say that the EU stands for the defence of democracy and the rule of law (35%), the free movement of labour, students, and travellers (28%), as well as increasing the citizens’ standards of living (25%). The respective shares of the mentions received by peace (24%), reducing the developmental gap between the member states (24%), and defending the values of human rights (23%) lagged barely behind the third most often mentioned topic. Government party supporters were most likely to identify the EU with the free movement of labour, students, and travellers (30%). For opposition voters, by contrast, the defence of democracy and the rule of law stood out (51% said that this is one of the top three values they associate with the European Union).

Compared to the 2019 data, we saw a major shift in this ranking: four years ago, those who responded to this question were most likely to mention economic development (44%) as one of the top three values, followed by the free movement of labour, students, and travellers (33%) in the EU, and human rights (32%). In 2023, respondents were less than half as likely (20%) than in 2019 to rank economic development as one of the most important values that the EU stands for.

The least frequently mentioned ideas in our 2023 list were family values (12%), cultural diversity (10%), and the protection of Europe’s external borders (9%). In fact, there was a significant drop in the share of those who mentioned cultural diversity as an EU value, since in 2019 21% of respondents had still seen this as important. The protection of the EU’s external borders (12%) and traditional family values (18%) had received relatively few mentions as priorities in 2019 as well.



In 2023, both government party supporters and opposition voters were most likely to mention peace as the principle they want the EU to stand for

We also wanted to find out what values Hungarians believe the EU should stand for in the future. **Forty-four percent of respondents designated peace as one of the top three values, while 35% selected raising citizens' living standards, and 31% said that the EU should focus especially on defending democracy and the rule of law.** There were also many – over 20% – who mentioned reducing the inequalities between member states (28%), human rights (23%), and economic development (22%). By contrast, few respondents selected combatting climate change (12%) and protecting the EU's external borders (10%), while barely anyone mentioned cultural diversity (2%) as one of the top three values that the EU should stand for in the future.

The juxtaposition of the most recent responses with the data from our previous surveys highlights just how much the war next door has transformed Hungarians' expectations vis-à-vis the EU. In our survey in 2019, raising the EU citizens' standards of living (35%) and the protection of democratic values (35%) were also among the top three priorities; at the same time, back then Hungarians were most likely to select economic development (44%) as the most important priority. In 2023, by contrast, peace (44%) far outpaces the others as a top priority, even though four years ago it was only in fifth place. **Currently, both Fidesz voters (44%) and opposition voters (45%) were most likely to expect the EU to treat peace as a priority objective.**

The EU's role in the world: A social Europe, a common economic stance, and the EU as a global defender of democracy and human rights

With respect to the EU's global role, respondents were most likely to think that the bloc should be a role model for the rest of the world as a "social Europe." Four out of ten respondents said that the EU should be a welfare state that plays a leading role in providing public services and supporting those in need. The concept of a "social Europe" as the most widely embraced idea concerning the EU's global role was followed by the preference for **a unified economic stance in the global economy, which was also designated by many (33%) as a priority. The share of those who believe that the EU should be a global defender of democracy, the rule of law, and human rights was similarly high (32%).** On the whole, respondents were also more likely to believe that the EU should spearhead efforts to combat climate change (27%) and technological innovation (20%) than to say that the EU should be a military power (18%). The share of respondents who think that the EU should primarily exert global influence as a cultural great power was smaller still (17%), nor do many want it to play a major role as a bastion of Christian values and traditions (17%). At the same time, only a tenth of respondents said that the EU should not harbour any global ambitions whatsoever.



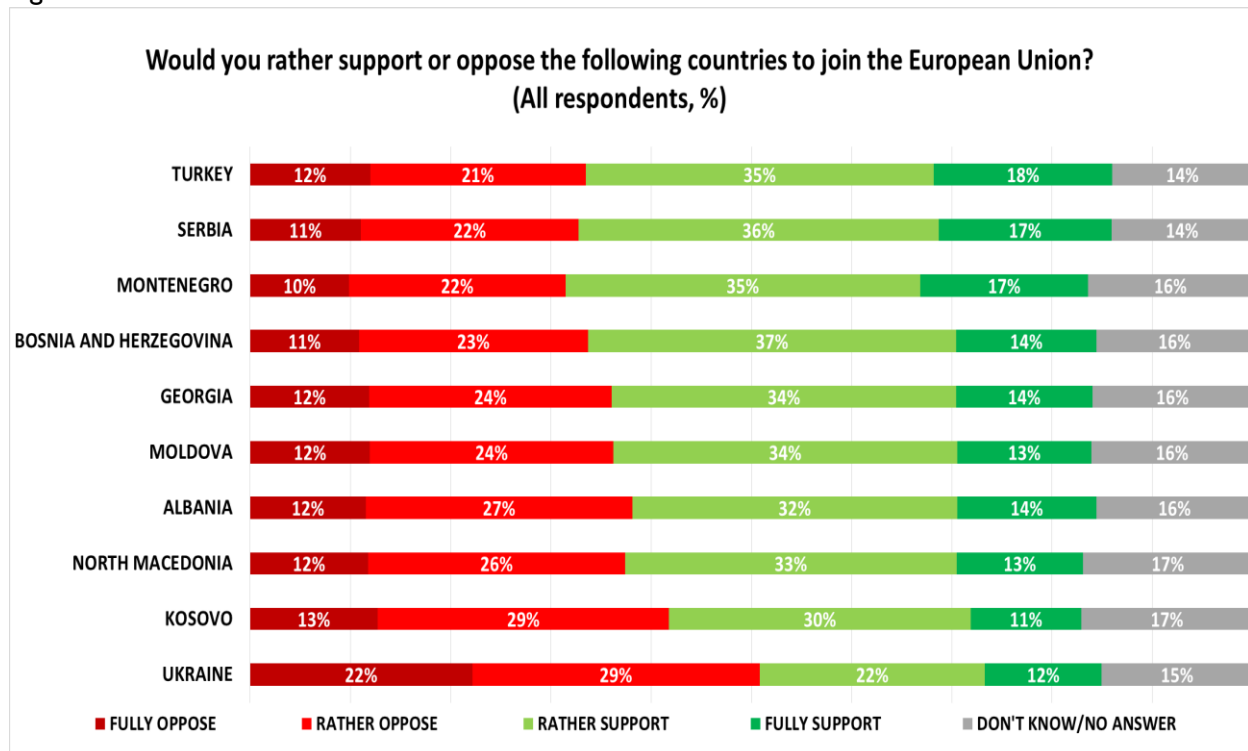
Hungarians would prefer to spend EU funds on healthcare and improving the situation of disadvantaged regions

The public’s ideas concerning the use of EU funds also informed us about the areas where Hungarians would most like EU membership to exert an impact on their lives. In the block of questions focusing on this issue, respondents were asked to select the three goals they considered most important. **Forty-five percent of respondents said that EU funds should be primarily used to improve the domestic healthcare system, 28% would spend on fostering the development and economic convergence of disadvantaged regions, and another 25% would use the money to help disadvantaged individuals directly.** Support for subsidising domestic enterprises and job creation was also high (24%), and so were the mentions of infrastructural investments (21%), and subsidies for environmental and energy efficiency programmes (20%). Education (19%), agriculture (15%), and support for municipalities (11%) occupied middling positions in our ranking of issues by the frequency of their mentions as a priority. Supporting NGOs or churches both proved less popular (5%), while digitalisation (4%) came in last on the list of priorities.

Hungarian society is open to EU enlargement, but the majority is opposed to allowing Ukraine to join

Over half of the respondents would support the accession to the EU of Turkey (53%), Serbia (53%), Montenegro (52%), and Bosnia-Herzegovina (51%). A plurality of respondents would also allow Georgia (48%), Moldova (47%), Albania (46%), and Northern Macedonia (46%) to join the EU (Figure 4). **By contrast, a plurality is against Kosovo’s accession (41% in favour and 42% against), while a majority said Ukraine should not be allowed to join (34% in favour, 51% opposed).**

Figure 4.





Among the government party's supporters, Turkey was at the top of the list: 60% of Fidesz voters support Turkey's membership bid. Fidesz voters were also most likely to oppose Ukraine's accession (62%). **Supporters of the six-party opposition bloc that had run against Fidesz in 2022 were most likely to endorse Serbia's accession to the EU.** Among the potential new member states, only Ukraine was rejected by a plurality of opposition voters, although in this segment the race between the supporters and opponents of accession was tight: 47% of the supporters of the six-party bloc were opposed, while 44% would allow Ukraine to join the European Union. **Among the supporters of Our Homeland, none of the potential new member states' accession was seen favourably by the majority.** The EU accession of Serbia (47%), Turkey (45%) and Montenegro (45%) were most likely to be supported by the far-right party's voters, 57% of whom were opposed to Ukraine joining the EU (the highest share of rejection in the case of Our Homeland voters).

National or EU competences: balanced policy preferences, with a slight shift in a pro-integration direction

In our survey, we also asked respondents about 19 specific policy areas. For each of these areas, we wanted to know which of the following arrangements they would prefer: if the given area were controlled exclusively by the nation-states; exclusively by the EU; or with shared control between the two? **An absolute majority said that the policy areas of state-owned lands and water management (58%), housing (57%), domestic commerce and the financial sector (54%), government operations (52%), and education (52%) should be within the exclusive competence of member states.** The same five policy areas had topped the list two years earlier as well. Although the sovereigntist majority persists in these policy areas, the share of those who prefer European integration (in other words, the proportion of respondents who said either that policies should be harmonised within the EU or should be in the exclusive remit of the latter) in these domains, too, has increased by 5-9 percentage points. In three further areas, namely labour and workers' rights, social policy, and agriculture, the sovereigntist position has lost its absolute majority (in these areas, the share of those who would prefer to see some type of EU influence has grown by 7, 4, and 9 percentage points, respectively). **In both of the years during which we most recently performed the survey, the camp supporting policy integration at the European level had a substantial majority (around two-thirds) in the areas of energy policy, the environment, technological development, defence and security policy, and foreign trade.**

The majority of Fidesz voters also agree that all the milestones should be met in order to gain access to EU funds; however, the suspension of the Erasmus programme divides Hungarian society

Seventy percent of Hungarians agreed that the government should meet all of the milestones specified by the European Commission to ensure that Hungary can finally access the EU funds. A quarter of the respondents (26%) disagreed with this. Even a majority of Fidesz (58%) and Our Homeland (55%) voters agreed that the government should satisfy all of the milestones set out by the European Commission. Among the supporters of the six-party opposition bloc, 84% agreed with this proposition, while among those who would opt for another party or who had no partisan preference, support for this position stood at 72% in each group.

The views in Hungarian society were far more divided when it came to the suspension of the Erasmus programme: 48% of respondents submitted that the suspension of the EU scholarship scheme in the case of the affected Hungarian institutions was the right decision, while 45% disagreed with this assessment. A wide majority of the supporters of the ruling Fidesz (63%) reject the suspension of the payment of the Erasmus funds for the Hungarian universities recently privatised and now controlled by public foundations. By contrast, the prevailing



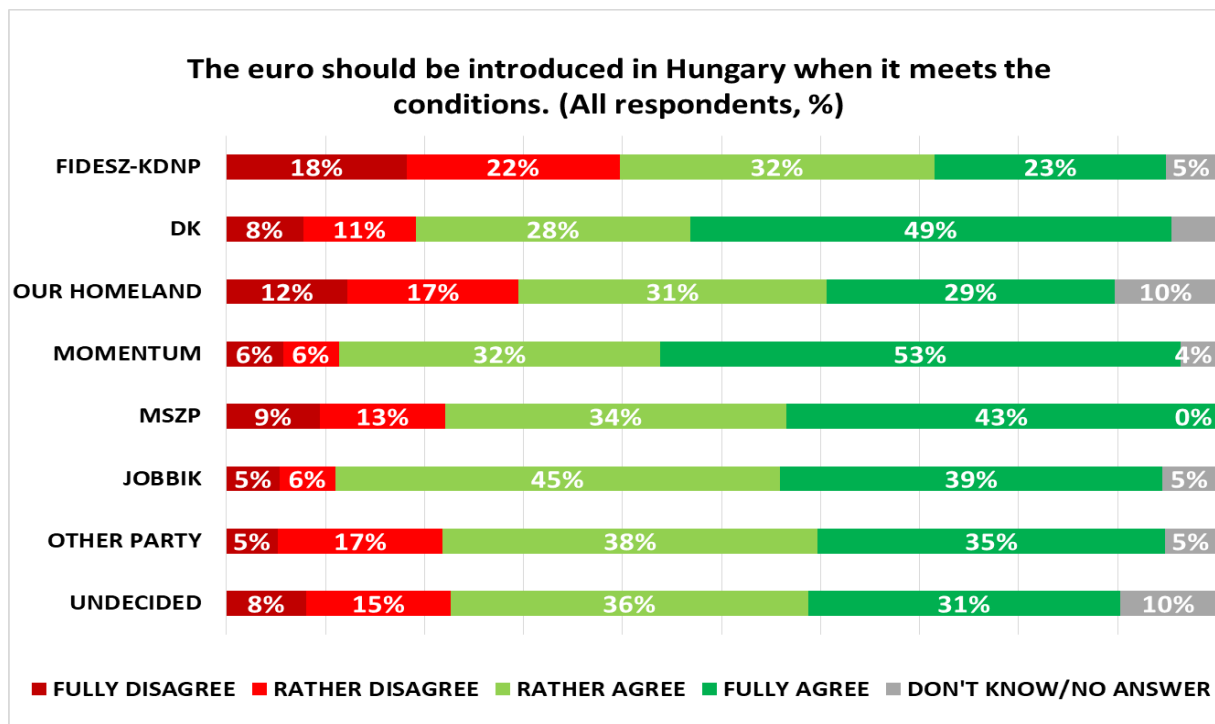
majority stance among the supporters of the six-party opposition bloc (64%), Our Homeland (52%), and the other parties (58%) is that the suspension of the Erasmus programme in these cases was the right decision.

Over two-thirds of respondents (69%) said that Hungary should join the European Public Prosecutor's Office (EPPO). A quarter of the Hungarian public (26%) said they believe it is more appropriate for Hungarian public bodies to investigate instances of corruption, and hence we should not join the European Public Prosecutor's Office. Even among the voters of the ruling party, the supporters of joining the EPPO were in the majority (51%), while 45% were opposed. Among the supporters of the six-party opposition bloc, 83% said that joining the EPPO was a necessity and only 15% were opposed.

A two-thirds majority supports introducing the euro

Two-thirds of the Hungarian public (67%) said that if Hungary meets the preconditions, then the euro should be introduced. A quarter of respondents (27%) disagreed with this position. This had also been the rough balance of Hungarian positions two years earlier when 64% supported introducing the euro and 27% had been opposed. Thus, on the whole, we found a three-percentage-point increase in the share of supporters since 2021. **Supporters of introducing the euro in Hungary were in the majority in all segments of the population by partisan preferences (Figure 5).** Government party supporters are less likely (55%) to support the introduction of the euro, and Our Homeland's voters were also less likely (60%) than the average to endorse it. By contrast, among the supporters of the Democratic Coalition, Momentum, MSZP, and Jobbik, the levels of support exceeded 75%.

Figure 5.





The majority supports Romania's accession to Schengen and the creation of a joint European army

A majority of respondents (58%) said that Hungary needs to resolutely support Romania's accession to the Schengen Zone. Slightly fewer than a third of Hungarians are opposed to this. The supporters of Romania's Schengen accession are in a majority in all political camps.

We also sought to ascertain what Hungarians think about the creation of a joint EU army. **Almost two-thirds of respondents (64%) believe that it is necessary to organise such a joint European armed force, while 29% are opposed to this idea.** Among the supporters of the six-party opposition bloc, three-quarters (74%) endorsed this idea, while a majority of government party (54%) and Our Homeland (63%) voters, as well as those without a partisan preference (52%), also assessed that establishing a joint EU army would be necessary in the future.

Fears and grievances: The strong impact of the government's communication

A majority (54%) of Hungarians agree with a claim that is frequently repeated in the pro-government media: "Brussels bureaucrats want to force their will on the Hungarian people." The share of those who said that this is not true was 12 percentage points lower (42%). There has been a slight shift in the public's overall view of this issue since we last surveyed this question in 2021: by 2023, the share of those who agreed that Brussels bureaucrats want to force their will on Hungarians had increased by 4 percentage points. Absolute majorities of Fidesz (74%) and Our Homeland (57%) voters shared this view, while among those without a partisan preference a plurality (48%) said that this was true. By contrast, a decisive majority (62%) of the supporters of the six-party opposition bloc and the voters of other parties did not agree.

We found a clear pattern when looking at the differences between the opinions on this issue in light of media consumption. **The image of overbearing Brussels bureaucrats is less prevalent among those who do not regularly consume media (38% in this segment agree with the claim, 49% reject it), as well as among those who exclusively consume media that are critical of the government (36% vs. 58%).** A slight plurality of those who mostly consume critical media (49% vs. 46%) and a slight majority of those with a balanced media consumption (54% vs. 43%) agreed with the government's claim. **The Eurosceptic position enjoyed a significant majority among those who either predominantly consume pro-government media (73% vs. 26%) or exclusively consume pro-government media (66% vs. 33%).**

Another recurring element in the government's communication is that the European Union wants to brainwash Hungarian children with its own ideology – this claim divides Hungarian society. While 46% agreed with the government's assertion, 48% did not accept the abovementioned message often propagated by Fidesz. Among Fidesz voters (69%) and the supporters of Our Homeland (56%), the prevailing majority view is that the European Union is indeed spreading propaganda to influence Hungarian children. However, the voters of the six-party opposition reject this claim by wide margin (70%).

Half of the Hungarian public (51%) also agree that the residents of the Eastern European member states – thus including Hungarians – are second-class citizens within the European Union, while only 45% disagreed with that assessment. Forty-eight percent of respondents said that the rules created in Brussels deliberately disadvantage Hungarian enterprises, while 46% said that there are no such discriminatory policies in place. This view is typically far more widespread in smaller municipalities: an absolute majority of the residents of small towns (50%) and villages (53%) believe that Brussels deliberately aims to disadvantage Hungarian enterprises, while in the large urban areas called county seats (38%) and in the capital Budapest (42%) this was a minority position.