



AUTHORS: ANDRÁS BÍRÓ-NAGY – KRISTÓF MOLNÁR – ATTILA VARGA

SEPTEMBER 2024

Over the past years, Policy Solutions' priority has been the publication of studies that analyse the view of Hungarians concerning their country's place and future in the European Union by digging deeper than the standard “remain or leave” question to attain a more nuanced view of the underlying issue. The present study, which is published on the occasion of the 20th anniversary of Hungary's EU accession and its ascension to the rotating Presidency of the Council of the European Union, continues this tradition: as compared to earlier research, it presents Hungarians' EU-related attitudes by delving deeper into the issue and looking at it from more angles.

Our study shows which advantages and drawbacks Hungarians are most likely to associate with the European Union in 2024 and how they assess the economic balance of EU membership. We especially highlight the question of how Hungarian voters view the processes ongoing in the European Union and what kind of changes they would like to see in the EU's priorities: what values should the EU stand for, and what global role should it aspire to? In order to discover what kind of Europe Hungarians want, we also asked them which member states they would want to add to the roster of EU countries. In our study, we also sought to find out what the imprint of the government's Eurosceptic campaigns has been and how strong the fears and grievances concerning the EU are in Hungarian society. Owing to our previous research on many questions, we were also able to track the changes over time.



We partnered with Závecz Research to conduct a public opinion survey between 13-24 May 2024 as the basis of our study. As part of the survey, 1,000 people were interviewed in person. The respondents were selected to be representative of the Hungarian adult population in terms of age, gender, educational attainment, and the type of municipality they live in. The study was realised with the support of the Friedrich-Ebert-Stiftung Budapest.

Four out of ten Hungarians knew beforehand that Hungary would be taking over the rotating Presidency of the Council of the EU in the second half of 2024

Starting in July 2024, Hungary took over the rotating Presidency of the Council of the European Union for a period of six months. On this occasion, we surveyed what percentage of the population was aware in advance of the fact that after 13 years, Hungary holds this function once again. Only 56% of those we surveyed were able to answer the open-ended question, and only 70% of those who provided a response to the question were aware that our country would be performing the responsibilities associated with the rotating presidency in the second half of 2024. **Thus, on the whole, only 39% of the total sample knew the correct answer.**

Among the government party voters, the share of those who knew this was slightly higher (60%), and as compared to the public overall, Fidesz supporters were seven percentage points more likely (77%) to identify Hungary as the next country to hold the rotating presidency. Fifty-six percent of the supporters of the Tisza Party answered the open-ended question, and 74% knew that Hungary would hold the rotating presidency starting in July. In the case of the DK-MSZP-P party alliance's supporters, there were still fewer respondents who answered (49%), and only 58% knew which country would be filling the role in question. Our Homeland voters were least likely to answer (45%), but two-thirds (67%) were aware that Hungary would hold the rotating presidency.

Eighty percent of Hungarians said that, on the whole, EU membership has been beneficial for Hungary

On the occasion of the 20th anniversary of Hungary's EU membership, we examined whether Hungarians were likely to say that EU membership has been more beneficial or disadvantageous for Hungary as a whole. **Eighty percent of respondents said that on the whole, EU membership has been advantageous for Hungary. Regardless of political preferences, over two-thirds agreed with this assessment, although there are some nuanced differences based on partisan affiliation.** While 68% of Our Homeland voters agreed, among Fidesz supporters, 77% thought that Hungary's EU membership has been a success, and this position was the near-consensus view among Tisza Party (87%) and DK-MSZP-P (86%) voters.

Hungarians believe that EU funds and free movement are the biggest benefits of EU membership

In line with previous surveys conducted by Policy Solutions, **in 2024, Hungarians were most likely to believe that the funds provided by the European Union and the opportunities for economic development therein were the biggest benefits of EU membership (53%).** This share is practically just as high as the one we measured a year ago (back then, 54% mentioned the financial aspect of EU membership).



In addition to the economic benefits, a third of Hungarians (33%) said that the elimination of physical borders and the possibility of free movement has been one of the pre-eminent benefits of Hungary's 20 years as members. This is followed closely by the possibility of taking jobs and studying abroad (32%). As compared to the results of previous years, the share of those who picked free movement increased by 3 percentage points, while the free movement of workers and students was 6 percentage points higher than a year earlier.

The biggest perceived disadvantages of EU membership: excessive regulation and migration are tied at the top

With respect to the disadvantages of membership, we found once again that, just as last year, excessive regulation topped the list in 2024 (23%). A further 10% of respondents stressed that as an EU member, Hungary's sovereignty has declined. Starting in 2019, we found that in each successive survey, respondents were increasingly less likely to mention migration as one of the disadvantages stemming from EU membership; however, this trend ended in 2024, **as we once again observed a surge in the number of answers mentioning migration as a problem. While a year ago 14% of respondents had referred to it in this context, this year, the share was nine percentage points higher (23%)** – equal to the mentions of excessive regulation.

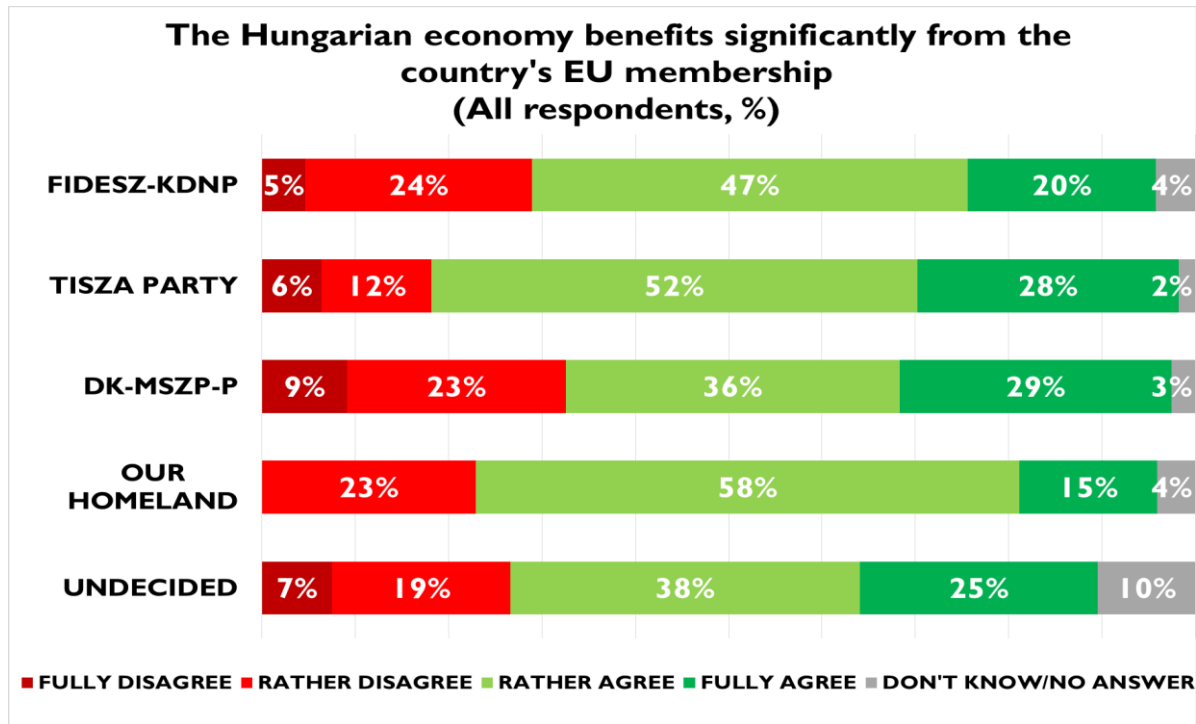
Thirteen percent of respondents stressed that the EU is attacking Hungary and freezing its funds, thereby pressuring the Hungarian government. The Hungarian government often claims that **the EU's handling of the Russia-Ukraine war and the associated sanctions policies are inadequate and inflict more harm on the EU member states and their citizens.** This issue continues to rank fifth on the list (12%). Another key area emerges from the answers, which ranked third in 2024: **14% of respondents said that thus far, the desired economic development and the convergence to Western European living standards has been lagging behind, while substantial economic inequalities continue to persist** (the share of those who mentioned this was three percentage points higher than a year ago). With regard to economic inequalities, the respondents mentioned specific examples: several alluded to the emigration of skilled labour; the low Hungarian salaries and pensions in European comparison, and the problems of the underprivileged regions which are falling behind.

The economic pillar of EU membership: over two-thirds believe that Hungary benefits economically from EU membership

According to 68% of respondents, the Hungarian economy has benefitted substantially from EU membership (Figure 1); this marks a two-point increase since 2023 (66%). Throughout all of our surveys over the past three years, a decisive majority of Hungarians agreed with this statement; however, we measured the highest value in 2021 (73%). Critical opinions were most often voiced by government party supporters (29%) and those who support the left-wing party alliance (32%). Nevertheless, the share of those who agree with the underlying statement was still at least around two-thirds across the political spectrum. Among the supporters of the Tisza Party (80%) and the far-right Our Homeland (73%) parties, the share of those who agreed was even higher.



Figure 1

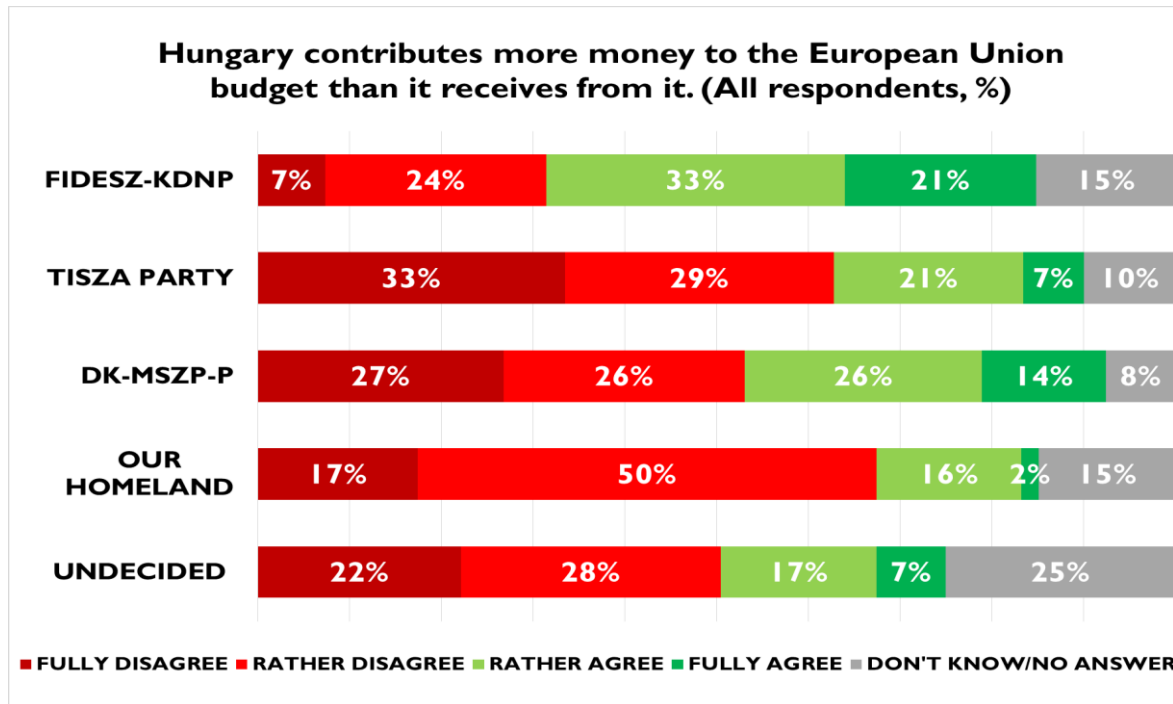


A majority of Fidesz supporters believe Hungary is a net contributor to the EU

In 2024, half of all Hungarians (50%) said Hungary benefits financially from EU membership (Figure 2). In other words, there is more money coming into Hungary from the EU than the amount we contribute. By contrast, slightly over one-third of respondents (35%) said that Hungary is already a net contributor to the EU budget, while 15% said they were uncertain. As compared to 2023, there has been virtually no shift in the Hungarian public's opinion on this issue. By contrast, three years ago, 29% of Hungarians had said that Hungary paid more money into the EU budget than it received. **Government party supporters are most likely to share this view: 54% said that Hungary has become a net contributor over the past years**, while only a third (31%) disagreed. Although over half of DK-MSZP-P voters (53%) believe that our country is among the winners of the EU budget, 40% believe that Hungary contributes more money. **Roughly two-thirds of the Tisza (62%) and Our Homeland (67%) parties' voters believe that Hungary is still a net beneficiary of the EU budget.**



Figure 2



Hungarian society continues to place greater trust in EU institutions than in domestic institutions

A plurality of respondents trust the European Court of Justice (47%), the European Commission (47%), and the European Parliament (45%). Hungarians are more likely to trust all three European institutions more than the Hungarian courts (40%) or the National Assembly (35%). Based on the 2024 results, we detect slight signs of polarisation with respect to the assessment of the EU institutions: we found a small increase over the past three years in the share of those who do not trust the EU institutions, with a decline in the share of neutral respondents. At the same time, the share of those who trust the EU institutions has remained unchanged. This allows us to conclude that the government's resurgent Eurosceptic communication in the past years has not managed to damage the reputation of the EU institutions on the whole, but it has slightly pushed the neutral positions into a more negative direction.

According to Fidesz voters, the EU currently stands for economic development, while the Tisza Party voters believe it protects democracy, and the Democratic Coalition supporters think it represents peace

Hungarians believe that the three most important values that the EU represents are economic development (35%), peace (32%), and the protection of democracy and the rule of law (32%). The former are followed – also mentioned by a substantial number of mentions – by the freedom of work and travel within the EU (29%), human rights (26%), and the fight against climate change (25%).



As compared to the previous years' results, the ranking has changed substantially: in 2023, most respondents mentioned the defence of democracy and the rule of law (32%), the freedom of work, studying, and travel within the EU (28%), as well as the improvement of the EU citizens' standards of living (25%) were seen as the values that the EU was most likely to stand for. **Over the past years, the share of those who picked economic development surged nearly twofold (2023: 20%; 2024: 35%), while peace, too, was chosen in 2024 by over a third more than a year ago (2023: 24%; 2024: 32%).**

Currently, government party respondents are most likely to think the EU stands for economic development (37%), freedom of work, studying, and travel (32%), and peace (32%). The supporters of the Tisza Party were most likely to pick the defence of democracy and the rule of law (44%), economic development (37%), as well as peace and human rights (33% each). **Between the voters of the Tisza Party and Fidesz, the most pronounced differences concerned democracy and the protection of the rule of law, as well as the mentions of human rights: Tisza supporters were twice as likely to pick the former and one and a half times as likely to pick the latter than government party supporters.** Among DK-MSZP-P supporters, respondents were most likely to pick peace (47%), democracy, and the protection of the rule of law (39%), and economic development (36%).

In 2024, the notion that the EU should primarily stand for peace has gained further ground among both ruling party and opposition supporters

Beyond the values that people thought the EU currently stands for, we also asked the public which values they believe the European Union should represent in the future. We asked respondents to choose the three most important values for them. **Respondents were most likely to mention peace (55%), followed by economic development (36%), while 30% picked democracy and the defence of the rule of law as the three most important values that the EU should represent in the future.** High proportions of respondents were likely to mention the improvement of the living standards of EU citizens (29%), human rights (26%), and the reduction of the differences in the development of member states (25%). Juxtaposing the results of the 2024 survey with our previous surveys, we find that **the Russia-Ukraine war is increasingly shaping the Hungarian public's expectation concerning the EU: 55% of respondents in 2024 mentioned peace as a value that the EU should stand for, while in 2023, the corresponding figure had been 44% and in 2019 it had been 30%.**

Both government party and critical supporters were most likely to pick peace as one of their top three answers to this question: among Fidesz voters, 64% selected it, while 49% of Tisza voters and 60% of DK-MSZP-P did the same. For all three camps, economic development was at the top of the preference rankings; for Fidesz voters, it came in second (38%), while for Tisza Party (37%) and DK-MSZP-P voters (32%), it ranked third. A marked difference can be observed in the expectations regarding the protection of democracy and the rule of law: while opposition voters put it as the second most important expectation of the EU (Tisza: 46%, DK-MSZP-P: 36%), for government party voters, it ranked significantly lower (22%).

The EU's role in the world: global defender of democracy and human rights, joint economic action, and a social Europe

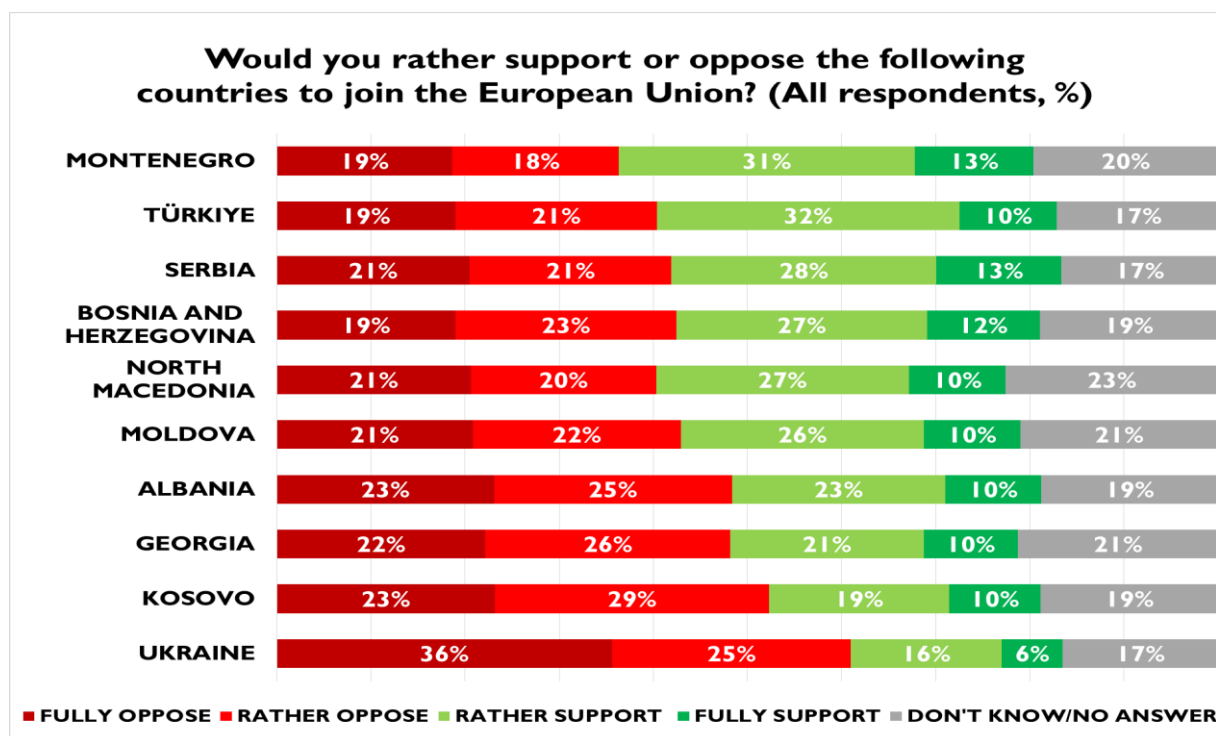
When it comes to the role of the European Union in the global order, a plurality of Hungarians (41%) believe that the EU should be a global defender of democracy, the rule

of law, and human rights. In addition to defending democratic values, many think the EU should act as a single economic bloc in the global economy (35%). The share of respondents who said that the EU should act as a welfare state that leads the way in the quality of public services and the promotion of social justice was just as high (35%).

Hungarian society's openness towards EU enlargement has also deteriorated in general, with six out of ten people rejecting Ukraine's EU membership

In 2024, the candidate country that enjoyed the highest level of support among Hungarians was Montenegro: 44% would support its accession (Figure 3). The Balkan country is followed by Turkey (42%) and Serbia (41%). Among the countries on which public opinion is divided, there was a clear plurality of those who oppose the accession of the given countries, including Bosnia and Herzegovina (39% in favour, 42% against), Northern Macedonia (37% in favour, 41% against), Moldova (36% in favour, 43% against), and Albania (33% in favour, 48% against). The least supported candidates are Georgia (31% in favour, 48% against), Kosovo (29% in favour, 52% against) and Ukraine (22% in favour, 61% against).

Figure 3



Compared to the previous year's data, it is striking that Hungarians are currently much less open to EU enlargement: in 2023, an absolute majority of respondents favoured the accession of several candidate countries. By contrast, in 2024, fewer than 45% of Hungarians were in favour of Montenegro joining the EU – and this was the candidate country with the highest level of support. The deterioration in the perception of Ukraine, which was already the most rejected candidate country in 2023, is striking: a year ago, a narrow majority of Hungarians (51%) would have opposed Ukraine's accession. By contrast, in 2024, six out of ten Hungarians were against Ukraine becoming a member of the EU (61%).



Among pro-government voters, Turkey (50%) and Serbia (48%) top the list. The absolute majority of pro-government voters oppose the accession of Kosovo and Ukraine, with 56% rejecting the former and almost three-quarters rejecting the latter (73%). **Voters of the Tisza Party are the most supportive of Montenegro's accession (50% yes, 36% no),** followed by North Macedonia, but with significantly less support (36% yes, 46% no). At the same time, more than half of the Tisza supporters would not support the accession of Turkey (50%), Serbia (51%), Bosnia and Herzegovina (51%), Moldova (51%), Ukraine (53%), Georgia (59%), Albania (57%), and Kosovo (61%). **However, amidst the overall negative opinions on Ukraine's possible accession, the least negative on the subject was found among Tisza Party voters (34% would support, 53% would oppose).** Overall, Tisza voters are more sceptical about EU enlargement, **while the DK-MSZP-P alliance has the largest share of pro-enlargement voters:** they were most in favour of Turkey (49%), Montenegro (47%), and North Macedonia (47%) joining the EU. However, relative majorities are against the accession of Moldova (44%), Bosnia and Herzegovina (45%), Georgia (46%), Albania (46%), and Serbia (48%). DK-MSZP-P voters are most opposed to the accession of Kosovo (50%) and Ukraine (56%). **The candidate country most supported by Our Homeland voters was Turkey,** with half of the party's voters in favour of its accession to the European Union. The far-right party's voters were most opposed to the idea of Ukraine joining the EU, with seven in ten **Our Homeland** voters (69%) opposing the country's accession.

Two-thirds of Hungarians said that the government should meet all milestones to secure access to the EU funds, but the suspension of the Erasmus programme divides Hungarian society

Two-thirds of Hungarians (66%) believe that the government needs to meet all the milestones set out by the European Commission as a precondition for releasing EU funds. A similar proportion (70%) had shared this sentiment a year ago, and a quarter of respondents (27%) disagreed with this statement. Forty percent of Fidesz-KDNP voters reject the idea of the government giving in to the European Commission, **but even among the supporters of the ruling party, an absolute majority would also consider it important to do so in order to get EU funding. Eighty-six percent of Tisza Party voters and 81 percent of supporters of the DK-MSZP-P alliance would encourage the government to meet the conditions.**

Half of those we surveyed (49%) believe that the European Union made the right decision when it suspended the Erasmus programme for students at Hungarian universities owned by the recently created public foundations, which are dominated by members loyal to the ruling party. A year ago, the proportion of those who agreed (48%) was almost the same as it is now, but a significant change is that in 2024, the share of those who are critical of the EU in connection with this decision was 7 percentage points lower (down from 45% to 38%). A majority of government party (46%) and Our Homeland voters (50%) condemn the European Commission's decision to suspend the Erasmus programme. Nevertheless, 40% of the former and 44% of the latter still think it was the right decision. Two-thirds of Tisza Party (64%) and DK-MSZP-P (62%) voters condemn the outsourcing of universities to public foundations and think it is important that the European Union has acted on the matter. However, both political communities also have a significant share of those who disagree with the European Commission's actions in connection with Erasmus, with 27% of Tisza Party voters and 31% of DK-MSZP-P supporters rejecting it.

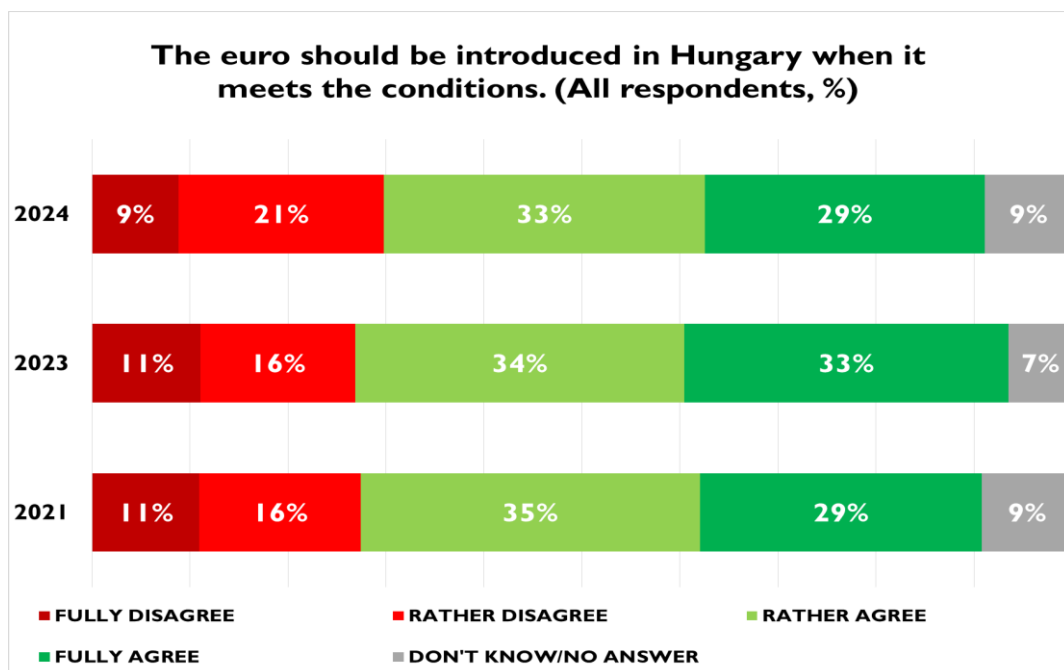


A solid majority also supports joining the European Public Prosecutor's Office and the introduction of the euro

Two-thirds of respondents (68%) believe that Hungary should join the European Public Prosecutor's Office, which could help ensure that domestic corruption can be investigated at the European level; a quarter of Hungarians (24%) disagreed. As expected, there are differences between the supporters of the various political parties. Although an absolute majority (56%) of Fidesz-KDNP supporters are in favour of joining the EU's prosecutorial institution, a third (34%) are against the proposal. At the other extreme are Tisza Party voters: 86% are in favour of joining the European Public Prosecutor's Office, with only 12% against.

Sixty-two percent of Hungarians believe that the conditions for joining the eurozone should be met and that the euro should be introduced, while slightly under a third (30%) disagreed (Figure 4). The fact that support for the introduction of the euro has consistently exceeded 60% over the past three years denotes a markedly stable level of support from Hungarian society. Still, 2024 marks the lowest figure we measured throughout this period, with a 5-percentage point drop since 2023. A majority in all political camps favours the adoption of the euro. A majority of government party supporters (55%) and of respondents without a partisan affiliation (55%) would be pleased if the euro were introduced. Two-thirds of Our Homeland voters (66%) and three-quarters of the supporters of the Tisza Party (75%) and of the left-wing party alliance (74%) are in favour of introducing the euro.

Figure 4



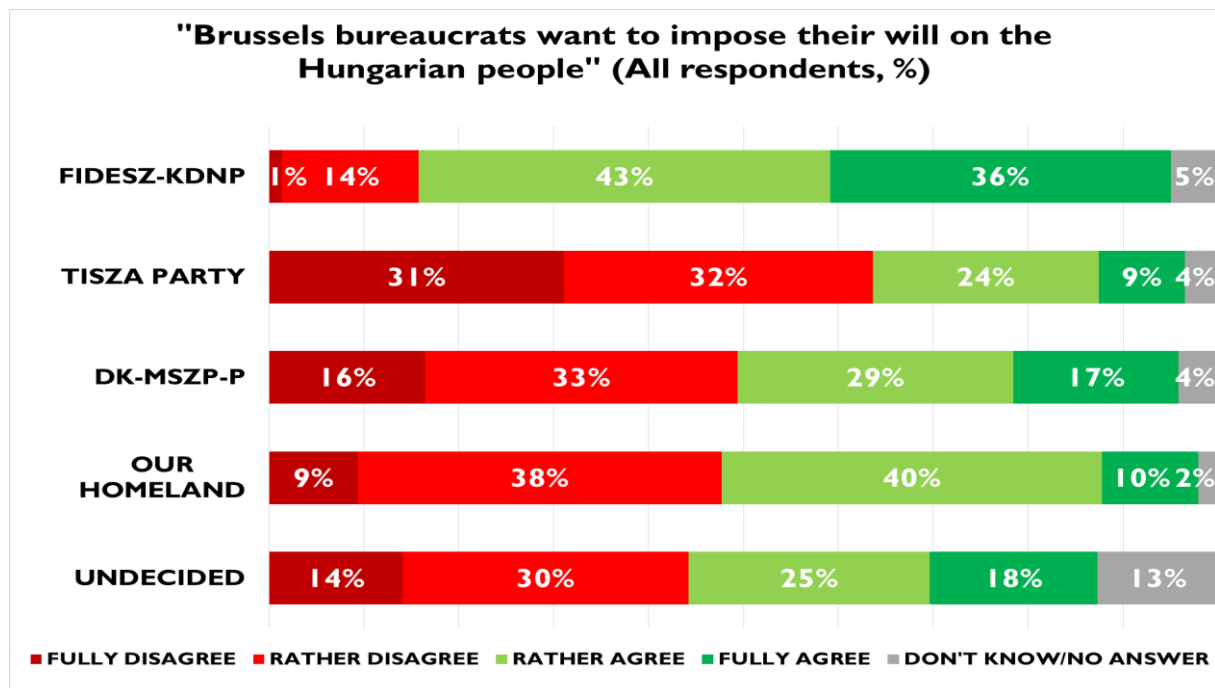
Fears and grievances concerning the EU: pro- and anti-government voters coexist in parallel universes

The final block of questions in our survey addressed issues that reflect the perceived and real fears and grievances of Hungarian society towards the European Union. Our results reinforced the perception that Hungarian public opinion can be divided into two parallel universes: all the responses reflected strong partisan fault lines.



Fifty-two percent of respondents agreed with the statement that "Brussels bureaucrats want to impose their will on the Hungarian people" – a notion that often appears in the Hungarian government's public communication – while 41 percent disagreed. This is the third time that we have asked this question in our survey on EU-related attitudes, and the results show that the distribution of the opinions concerning this statement has been stable over time: in all three surveys, the proportion of those agreeing ranged between 50-54% and the proportion of those disagreeing ranged between 41-42%. **Fidesz-KDNP voters overwhelmingly agree with the claim: four out of five government party respondents (79%) believe it to be true and only 15% disagree.** The proportion of those agreeing has increased, with 74% saying so a year ago, while only about a quarter (24%) disagreed. Tisza Party voters were most likely to reject the claim, with nearly two-thirds (63%) disagreeing (Figure 5).

Figure 5



A widespread fear concerning the European Union among Hungarians is the belief that the EU wants to force Hungary to let in immigrants: 56% of Hungarians agree with this statement. Among the supporters of the governing party, an overwhelming majority shared this position: eight out of ten (82%) Fidesz voters think so. The majority of Our Homeland (56%) voters also agree, while DK-MSZP-P and Tisza Party voters tend to disagree: 54% of the former and 57% of the latter party's supporters do not think that the EU wants to force Hungary to accept immigrants.

Half of Hungarians (49%) disagree with the claim – frequently aired by pro-government media – that "the EU wants to brainwash children with its own ideology". However, the proportion of those who agree with the statement is not much lower (44%). A huge majority of Fidesz voters (70%) consider the statement to be true. Meanwhile, among the supporters of the other parties, the dissenting opinions are in the majority: Tisza voters are most likely to believe that this claim is false (70%), while among DK-MSZP-P (55%) and Our Homeland supporters (44%), those who dissent still make up a majority or probability, but by a smaller margin.

Another frequently voiced statement in Hungarian public discourse claims that the residents of the EU's eastern member states – including Hungarians – are only second-class citizens in the EU. About half of Hungarians (49%) agree with this statement, while 45% disagree. Broken down by the respondents' party preferences, this is another issue on which pro- and anti-government voters are massively divided. Over two-thirds (70%) of Fidesz respondents



agree, a ratio that is slightly higher than the 67% in 2023. In contrast, 51% of Our Homeland voters disagree, as do 55% of DK-MSZP-P supporters and 73% of Tisza voters.

Similarly to the previous statement, 49% of Hungarians agree that "Brussels is making rules that deliberately put Hungarian businesses at a disadvantage". Forty-four percent disagree. Nearly four-fifths (77%) of governing party supporters agreed, up 6 percentage points from 2023. Supporters of Our Homeland also tend to agree (50%). Among DK-MSZP-P voters, 42% agree, while the majority of the left-wing party alliance supporters disagree (56%). Tisza voters came out most strongly against the government's claim on this issue, with nearly two-thirds (63%) rejecting this criticism of the EU.