



Hungarian Politics in 2024



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Introduction

Policy Solutions has a long history of providing international audiences with in-depth analyses of Hungarian political life. For the eleventh time, we publish our annual review of Hungarian politics. This is a comprehensive overview of recent developments, events and trends in Hungary in 2024, and an outlook on what topics we expect to dominate Hungarian politics in 2025.

The target audience of this publication is students and academics, journalists, diplomats or international organisations. In other words, anyone who has an interest in the political landscape of Hungary in 2024, be it the strategic challenges of the Orbán government, the state of the opposition, the tense Hungary-EU relationship or the consequences of Trump's election victory in the US. It is important to stress that our review is not chronological and does not claim to be exhaustive in its scope, rather it reflects our selection of the major developments over the past twelve months.

In particular, we focus on three broad areas, presenting distinct developments in each. In the first section we review the year from the perspective of the Hungarian government, with a special emphasis on the strategic situation of the government at the end of 2024. In the second section we look at the opposition parties, their state and prospects after the 2024 EP and municipal elections, focusing on the challenges facing the Tisza Party led by Péter Magyar. The third section focuses on foreign affairs, in particular the developments between Hungary and the European Union, and the foreign policy opportunities of the Orbán government under the new Trump administration. All of the sections conclude with a brief analysis of the issues which may come to the fore in 2025.

1

The Hungarian government in 2024

1.1 | No rest for Viktor Orbán: economic difficulties and a formidable younger challenger make life difficult for Hungary's Prime Minister

Fifteen years in power was supposed to be a key milestone when things could have mellowed for Viktor Orbán; not that he necessarily wants things to be mellow. He has had a decade and a half with a constitutional supermajority to entrench a new regime, and he has used that time intensely. Despite the EU's protests and the rule-of-law super milestones imposed by the latter, at the end of 2024, Orbán's regime decided to chip another considerable block off the last remaining major branch of public power that is not fully Fidesz-controlled yet, namely the ordinary court system. The most recent amendment of the judicial system, formally adopted in compliance with the EU's expectations, is designed to curtail independent judicial review in further areas, making the appointment and transfer of judges and cases easier from the top of the organisation, where Fidesz has become dominant. Although this project will never be fully completed, the Fidesz deep state is at this point firmly enough established to give Fidesz a sense of security and to make the life of any government not led by the current ruling party miserable.

A volatile situation for the Fidesz government

Yet, outside the deep state, at the surface where daily politics and everyday life happen, the situation is not quite as rosy. In fact, the storm has been brewing for Fidesz for a while now, ever since the Covid pandemic ended roughly 7 years of continuous economic growth, only to be followed by a massive wave of inflation. Both,

Covid and inflation hit Hungary exceptionally hard. In a sense, the war in Ukraine proved a welcome distraction that the ruling party was able to exploit to highlight Orbán's experience as a leader while presenting the opposition's support for Ukraine as a declaration that the opposition wants to join the war on the side of Ukraine and against Russia, an idea that many Hungarians found dangerous. Thus, at a time of great international crisis, Orbán managed to portray himself as the less risky/safer bet, even as the dissatisfaction with the economy – once the linchpin of Fidesz's sustained support – increased and spread through large parts of Hungarian society.

Still, nothing of the storm was visible before 2024. Once Fidesz cruised to a landslide re-election victory in 2022, it seemed that those segments of the Hungarian society that were opposed to the regime had given up for good. Their hopes had been shattered too massively by the unexpected margin of Fidesz's victory, by the steep fall from the high hopes engendered by the primary in late 2021, as well as the actual result of barely over a third of voters opting for the leading opposition candidate. Fidesz had not merely won re-election, it appeared to have quashed the hope of change for many years to come.

Rumblings beneath the surface

Thus, everyone, including the governing party, was caught off guard not only by the appearance of an unexpected challenger but also by the vast dormant desire in Hungarian society for change.

The sudden rise of the mid-tier Fidesz manager Péter Magyar as a formidable challenger to Viktor Orbán's regime reflects how deep the disappointment of the Hungarian public runs. At this point, neither the threat of the opposition's alleged war-mongering nor its migrant-friendliness work any longer to put the voters automatically off the new opposition party, Tisza. Especially since many voters consider Magyar credible in his claim that he would essentially pursue the same popular Fidesz policies on these issues.

As Policy Solutions' own annual surveys have suggested (see details in Chapter 1.2.), the public is now less likely to attribute the problems in Hungary to outside sources – as the government would prefer – and increasingly more likely to believe that the government itself bears responsibility for the lagging economy and the fact that wages have not kept track with the immense inflation of the last years, which was the worst in the EU and significantly higher than the average.

Deflection no longer works

Up until 2020, owing to the steady growth, the government was able to hide the fact that, relatively speaking, Hungary was falling behind the rest of the region economically. Then it was able to deflect responsibility to external players. However, now that the delivery of the promise of growth keeps getting delayed, the forint is depreciating massively and prices keep rising, it seems that the patience of a growing number of voters is wearing thin.

The rise of Péter Magyar, the biggest political challenge for the Orbán regime thus far, is both a consequence of this growing frustration and a contributory factor to its further spread. Magyar has not said anything new about Fidesz as compared to the criticisms of the "old" opposition; it's merely that because of his telegenic appearance, his extremely fortuitous (or savvy, if you prefer) timing, and the media's willingness to cover him endlessly, many voters who were unlikely to listen to established opposition players now listen to Magyar. And what they hear largely coheres with their experience of Hungary under Fidesz.



It is a bit like the fairytale about the emperor's new clothes, except that no one listened to the first dozens of kids who exclaimed that the emperor is naked; finally, they have found one who successfully drives the obvious facts home. Until now, Fidesz has been adept at concealing the realities of its public policies, including the retarded growth, the extreme levels of corruption, along with the link between the two. But now, it must find new ways of re-establishing the "reality blockers" in public perception so it can take back control of the public agenda in time to secure a re-election victory.

On the economy, a tough situation

At the same time, manipulating perceptions may no longer be enough. The ruling party must actually do something for the economy. And that is not going to be easy. The budget is strained beyond capacity. Years of excessive spending, graft and wrongheaded policies have narrowed the room for the government to induce temporary growth bursts and increase the availability of money in society in time for the election.

In a stroke of luck, György Matolcsy's term as the head of the Hungarian National Bank will expire in March 2025. Originally a fierce Orbán loyalist and, in fact, the architect of Fidesz's economic agenda in the 2010s, Matolcsy has emerged as a critic of the government's policies, using his powerful perch both to publicly highlight problems and to try to manage monetary policy with a more orthodox approach. With Matolcsy at the helm of the central bank, it would have been more difficult for Fidesz to completely dominate the election year in terms of economic policy. Now they can print money and increase the deficit without Matolcsy boo-hooing from a relevant position.

No easy solutions in sight

Still, printing money in a volatile global environment, with a ballooning deficit whilst undermining judicial independence, is a

gamble that is not likely to inspire investor confidence. This may well be reflected in the forint exchange rates, and in a small country in which many people have an acute awareness of how much a euro costs, it could also undermine the confidence in Viktor Orbán's stable stewardship of the economy. This is the price of an approach towards governance in which short-term political interests have consistently overwhelmed long-term national strategic considerations.

Of course, it is rare enough for democratic governments to win four elections in a row, but doing so with the same majority in the legislature is extremely unlikely; in Hungary, it has been achieved through tinkering with the election system and the framework conditions governing democratic elections, both of which have been heavily modified since 2010 to better reflect Fidesz's interests. In December 2024, the government adopted an amendment for gerrymandering district boundaries, including adjustments to the Budapest boundaries. These are aimed at softening the impact of Tisza's recent surge and helping the ruling party preserve its majority in the Hungarian parliament.

Yet, as long as the votes are fairly counted – which has remained the rule thus far – this only protects the ruling party from limited shifts in the balance of the votes, with the special caveat that the opposition needs to remain disunited. Without tinkering with the actual results, which has not happened thus far, it cannot shield Fidesz from a landslide shift towards a united opposition.

In the process of exploring the strategic position of the government and the ruling party in Hungary, it also bears pointing out that the intensity of its manipulations of the democratic elections has been inversely proportional to its publicly projected paranoia about what could transpire in the event of an opposition election victory. The reality is that unless it decides to ignore or flout the law, an opposition-led government would have an extremely hard time governing against the Fidesz deep state.

Rural votes are Fidesz's strongest asset for the next elections

The Orbán government has been at a similar critical juncture before, at the end of 2014 and in early 2015, when its support was at a nadir and opposition victories based on tactical voting happened in constituencies in which Fidesz had been favoured to win. It was then that the ruling party came up with the anti-migration campaign, which led to the most massive realignment in the Hungarian party system since the establishment of Fidesz as the leading right-wing party in the 1990s.

Starting in 2015, a realignment occurred in which Fidesz traded in its educated urban electorate for a surge in rural constituencies, especially those ones where it had previously failed to establish itself as the dominant party despite winning pluralities. As a result of this realignment, the opposition in Hungary gained a foothold in the most conservative and elite districts in Budapest – including areas where anyone but Fidesz winning had been previously inconceivable – while, in turn, it became very strong in most of the rural districts.

The example of the changes that began a decade ago highlights Fidesz's most important strategic assets as it tries to put Péter Magyar in place. For one, the geographic distribution of its electoral support is such that it would take a landslide victory for the opposition to dislodge Fidesz from its majority in parliament. Even as the ruling party is losing support in Budapest, for example, this will have a very limited impact on the distribution of seats in parliament since the opposition has pretty close to maxed out the number of seats it can win in the capital, adding new voters is barely going to add to its share of seats in the legislature. At the same time, Fidesz's buffer in most rural areas is so massive that it will be hard for the opposition to actually flip seats, especially as long as Our Homeland and the Democratic Coalition retain diminished but nevertheless significant support in many areas.

Given the information consumption patterns in many of Hungary's rural constituencies, where legacy media still run strong, the second asset

in Fidesz's arsenal, namely the immense communication machine, provides another layer of strategic reserve for the ruling party. Part of the reason why the anti-migration campaign was such an enormous success politically speaking was that the government disseminated endless amounts of propaganda through a burgeoning media network that echoes its message on TV, radio and in the newspapers. Combine these with the vast financial resources at Fidesz's disposal, and we are likely to see major efforts by the government to try to reclaim the control over public discourse from Péter Magyar.

Politics not before, but largely in the place of policy

Interestingly enough, the one thing that does not occur to Fidesz is to actually seriously reform the things that are malfunctioning in the country. As the headlines proliferated about trains breaking down in astonishing numbers in Hungary, while AC systems in hospitals broke down in the record summer heat, making many surgeries impossible, the only thing Fidesz spokespersons could do is to lay the blame at the door of the the left, which has not been in power for over fourteen years. Even as the National Railway Company was forced to ask potential passengers to try to avoid travelling with its trains, which is a perfect symbol for public services under Fidesz, Orbán said that the minister responsible, János Lázár is one of the best-performing in his cabinet.

Viktor Orbán and his government are in denial about the impact of their neglect of public policy. It is only with this underlying delusion that the idea of forgoing EU funds is even conceivable. This would be an epic sacrifice for Hungary, decided by people who have made themselves incredibly wealthy from taxpayer money at the expense of millions of citizens whom they have appropriated the money from.

This is an extremely politicised government even by the established standards of modern democracies. Thus, the answer to the Tisza challenge might be mostly political involving a mix of propaganda, harassment by state authorities, and electoral manipulation but less public policies that could actually benefit the public.

1.2 | The key to re-election: will the economic perceptions of Hungarian society improve?

One of Policy Solutions' main objectives is to use its research to contribute to a deeper understanding of the Hungarian society, and to thus help ensure that Hungary's development is based on policies that reflect and address the most important concerns of the Hungarians. In line with this mission, we regularly explore the issues that shape the views of Hungarians when it comes to their personal situation, and the current situation and long-term prospects of Hungary.

In this chapter, we present the fears and hopes that characterised Hungarian society in 2024. The results of our survey provide us with a picture of how the financial situation of Hungarians has changed over time, while at the same time, it also shows what the Hungarian public is most concerned about in terms of their country's problems. As well as outlining Hungary's current problems, we also sought to get a sense of what Hungarians think their country needs in order to become a better place in the future.

As the basis of our analysis, we partnered with Závecz Research to conduct a public opinion survey between 28 September and 8 October 2024. The survey used in-person interviews and collected answers from 1,000 respondents who were representative of the Hungarian voting-age population in terms of age, gender, education, and the type of municipality they live in. The research was supported by the Friedrich-Ebert-Stiftung Budapest.

Hungary's key challenges for 2024: low wages, high prices, and quality of health care take centre stage

Low salaries were the most pressing issue for Hungarians in 2024 (36%). This issue has moved from third to first place since last year. Since the beginning of 2021, the cost of living has been the top issue on the Hungarians' problem list in all Policy Solutions studies – this changed in autumn 2024, with more Hungarians now considering low salaries to be a major problem than high prices (34%). Cost of living was the second most often cited issue this year, with the state of health care clinching the third (30%) spot in 2024 after finishing second last year. There was no change compared to 2024 in the fourth and fifth-placed issues: a quarter of respondents (25%, 4th place) mentioned the high level of corruption, and 18% (5th place) see the level of social inequality as one of the biggest problems in Hungary.

Over the past few years, several issues that are less important than those mentioned above have dominated the political agenda. In 2024, this included immigration (10%), the level of Russian influence in Hungary (7%), and the government's focus on tackling "homosexual propaganda" (8%). Concerns about the building of battery factories (11%), an increasingly prominent issue in public discourse, now exceed concerns about Russian influence or LGBTQ issues. The situation of public transport, which has also been increasingly discussed this year, is less of a concern for Hungarians (6% ranked it among the top three issues).

Fidesz voters are most worried about cost-of-living problems, Tisza Party supporters are most worried about corruption

Among Fidesz-KDNP voters, concerns about low salaries (38%) and the cost of living (38%) have risen sharply in recent years. They are in a dead heat at the top of the list of concerns, along with the state of public health (29%). Compared to the Hungarian public overall, government-party respondents are more concerned about the state of pensions, the migration of skilled workers abroad, and the vulnerable position of workers vis-à-vis employers. Not surprisingly, they are less concerned than the average respondent when it comes to corruption, the state of democracy and the rule of law.

Tisza Party supporters are most concerned about the level of corruption (33%). Their second and third highest concerns are the low quality of health care (31%) and low salaries (31%), respectively. But the cost of living just barely failed to make it into the top three, with a share of mentions that was only 2 percentage points (29%) below that of low salaries. Furthermore, it is clear that as compared to voters of the governing party, the supporters of the party led by Peter Magyar are especially concerned about the deterioration in the quality of democracy, as well as the growing Russian influence.

Among the residents of the urban centres called county capitals, the level of salaries was the most frequently cited problem (44%). Furthermore, the situation of healthcare was also seen as one of the biggest problems in larger cities (41%). A surprising new finding is that corruption (28%) and the quality of democracy (20%) are of particular concern to the residents of small towns: corruption was 4-7 percentage points less likely to be mentioned by the residents of other types of settlement, while 7-8 percentage points fewer were concerned about the state of democracy.

Opposition voters see their financial situation worsening, Fidesz voters report stagnation

The year 2024 did not result in any material improvement for the vast majority of Hungarian society: 50% of respondents reported stagnation in their financial situation, while 46% experienced deterioration. Only 4% of respondents said that their financial situation had improved. These rates are almost identical to our 2023 survey results; the only difference was a slight change in the proportion reporting an improvement, which increased from 3% to 4% in 2024. The past year has, therefore, failed to yield any substantial improvements in the financial situation of Hungarian households. In fact, it has only resulted in further stagnation and deterioration on top of the unfavourable trend we found in 2023.

Just over a quarter of government party supporters (28%) felt that their financial situation had worsened over the past year. By contrast, opposition supporters were more than twice as likely to say so. Fifty-nine percent of Tisza Party voters saw their financial situation worsen in 2024, while 57% of DK voters and 58% of Our Homeland supporters felt the same way. We should also add that the majority of Fidesz-KDNP voters did not perceive their financial situation to have improved significantly either, with only 6% choosing this option, while almost two-thirds reported stagnation in their financial situation.

People with lower educational attainment are more affected by the cost-of-living crisis. Over half (55%) of those with only primary education or less, and 48% of those with vocational or technical education reported a worsening of their financial situation. In contrast, the majority of respondents with a higher education degree (59%) or a high school diploma (48%) reported stagnation in their financial situation. An interesting development is that when compared to our 2023 survey, in the two intermediate educational attainment categories, respondents were more likely to report a worsening of their financial situation. While in 2023, 43% of those

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A COMPREHENSIVE SURVEY OF HUNGARIANS IN 2024



who had completed vocational education and training reported a worsening of their financial situation, this ratio increased to 48% in 2024. For those with a high school diploma, the proportion surged from 42 to 46 percent. This may suggest that the cost-of-living crisis is increasingly spreading to those with intermediate levels of educational attainment.

Economic outlook: the vast majority of Hungarian society expects the cost-of-living crisis to continue in 2025

After the hopes of 2024 have faded, the Orbán government's economic policy now touts 2025 as the year of economic recovery. Hungarian society is decidedly less optimistic about next year's prospects than the government. Only 6% think that their financial situation will improve next year, while 36% expect it to worsen. Half of all respondents (49%) do not expect any change. Overall, the majority of Hungarian society expects the cost-of-living crisis to linger on in 2025.

Budapest residents were least likely to be pessimistic about their future financial situation (27%), with the majority expecting stagnation (51%). By contrast, residents of small towns are the most pessimistic, with 41% expecting their financial situation to worsen, the same proportion as those expecting no change in the future. While in 2023, people living in county seats had been the most pessimistic (45%), this year, it was people living in small towns who had the dimmest view of their financial situation (41%). This may be because 2024 was a particularly difficult year financially for people living in small towns: theirs was the only type of settlement in which an absolute majority of respondents reported a worsening of their financial situation during the past year (52%). Even though small towns have served as key voter bases for the governing party, the Tisza Party did surprisingly well in these municipalities during the EP elections. Growing financial problems may also play a decisive role in the increasingly open party political competition in small towns.

Why do Hungarians not consume? Because of prices, salaries, and housing difficulties

One of the most important economic policy questions in Hungary in 2024 has been the issue of why household consumption did not recover quickly once the 2022-2023 inflationary period ended. This is why we conducted a detailed analysis of this issue as part of our research. We asked respondents to name the three most important factors that impede the growth of their consumption.

A significant majority of Hungarian society (60%) cited excessively high prices as one of the biggest obstacles to increased consumption. This suggests that even though the inflationary wave has subsided, a large part of the population still feels that price levels are too high, which discourages them from consuming more. The second most often mentioned issue in this context was that salaries are too low (46%). It seems that despite a real wage growth of almost 10% (a figure that refers to average wages), many still consider income levels insufficient to increase consumption. The third most important factor is the high cost of housing (27%), ahead of low pensions and a general lack of confidence about the future. This highlights the severity of the housing crisis and high utility prices in Hungary. Younger age groups (18-29 and 30-39) were more likely to cite this issue than the average respondent (33% and 34%, respectively), which highlighted the problem of housing has become especially concentrated for younger generations.

A distinguishing feature of Fidesz-KDNP voters is that, as compared to opposition voters, they were more likely to cite the Russia-Ukraine war as a factor of uncertainty and instability that inhibits their consumption. For Tisza Party voters, by contrast, the fear of war was less important; in their case, the distrust toward government policy is an important additional barrier to increased consumption.



Hungarians blame the government, rather than the Russia-Ukraine war or the EU, for the prolonged economic difficulties

We also asked the participants who they believe is responsible for what is happening in the Hungarian economy. According to our respondents, the Hungarian government has the strongest impact on the Hungarian economy (49%). The impact of multinational corporations and the European Union tied for second place (31%). This was followed by the Russia-Ukraine war (30%) and, trailing far behind, the United States (23%). Compared to the results of our 2023 survey, the perception of the economic impact of the Russia-Ukraine war has dropped slightly (by four points). In addition, the proportion of respondents who consider the European Union to have a very strong impact on the Hungarian economy has also fallen, from 38% to 31%.

All political camps see the Hungarian government as an agent with a significant impact on the Hungarian economy. Tisza Party voters were especially likely to agree (55%). In addition to the role of the Orbán government (41%), pro-government voters also see the impact of the Russia-Ukraine war (37%) and the European Union (37%) as significant, which is consistent with the government's communication. However, compared to 2023, the data suggest that in 2024, a popular and recurrent mechanism that was often reflected in the responses, which seeks to exonerate the Orbán government from responsibility, has become less prevalent with the role of the EU and the war diminishing. This may suggest that the persistence of the economic difficulties is increasingly less likely to be attributed to the war and more likely to be seen as the fault of internal actors (government, multinationals).

What will it take to make Hungary a better place? Higher salaries and pensions, quality health care, less corruption

Finally, we asked what our fellow citizens think Hungary needs to do in order to become a better place in the future. Respondents were

asked to choose three out of 18 options. Hungarians think that the most important issue that needs to change to make Hungary a better place is for salaries and pensions to increase (37%). A third of respondents (31%) also said that improving the quality of health care is essential. A quarter of Hungarians also saw reducing corruption (26%), taxes (24%), and social inequalities (23%) as essential.

In summary, Hungarians believe that the main areas where their country needs to improve are the economy and cost of living, healthcare, and reining in corruption. Lower-level priorities were strengthening democracy and the rule of law (17%) and reducing polarisation (15%), while many saw improving public education (13%) and supporting young people (16%) as necessary preconditions of a better country.

1.3 | Outlook on the Hungarian government's prospects in 2025

The most important issue for the government in 2025 will be whether the economy can pick up. Fidesz has been in 24/7 campaign mode for a long time now, using its ever-growing media empire to dig for issues it could use to batter the opposition. Nevertheless, while the pro-government media has been a key tool in Fidesz's efforts to hold on to power, the most vital element of its enduring popularity was the economy, which grew continuously between 2013, when the lingering effects of the financial crisis were finally overcome, and 2020, when the Covid pandemic hit Hungary. For a while, the government could attribute the post-2020 lag in economic growth and the accompanying cost-of-living crisis to the impact of the Covid pandemic and then the war in Ukraine. However, there are signs – most conspicuously the meteoric rise and surprisingly enduring popularity of Péter Magyar and his Tisza party – that the public's patience is wearing thin.

That does not mean that there is not time enough for the government to turn this boat around. But whatever recovery is actually achieved or at least projected to be achieved in the foreseeable future, the foundations must be laid in 2025 for any impact by the time of the next election. So we should expect Orbán's designated economic wizard, Márton Nagy, to show something for all the hopes vested in him. It bears pointing out that a temporary bump in GDP growth can be achieved with massive government spending, which the government plans to do anyway in late 2025 and early 2026.

Furthermore, while at this point, it seems essential to kick-start economic growth, in and of itself, it may not be enough to

give Fidesz another easy ride if Tisza remains in good shape to contest the next election. Fidesz will likely dig for other issues that polarise and divide Hungarian society, trying out new forms of stoking fears, whilst investing in new rounds of its now "traditional" anti-migration and anti-LGBTQ campaigns. Fidesz will also do its utmost to portray Péter Magyar as a puppet of Brussels, against whom Fidesz must defend Hungary's national sovereignty.

2025 is also likely to feature further tinkering with the election law since Fidesz must take care not to introduce too many amendments near election time, for fear of suggesting desperation. If it is seen as desperate against a self-confident Péter Magyar, that might help turn the tide against Viktor Orbán. From the sudden, precisely targeted gerrymandering introduced in 2024, it is obvious that Fidesz's engineering brigade is continuously at work trying to find new ways in which the ruling party could further manipulate the electoral system to give itself an edge. Lowering the threshold that smaller parties must reach to enter parliament may also be on the agenda, as it would incentivise smaller opposition parties to run and draw votes from Tisza. The most obvious method would be to give ethnic Hungarians abroad some single-member constituencies. In a small parliament such as the Hungarian, even a few safe seats could contribute quite significantly to the government's buffer at the next elections. If the polls continue to show a competitive race between Fidesz and the Tisza party, look out for these and other changes to the election framework.



2

The Hungarian opposition in 2024

2.1 | The transformation of the Hungarian opposition at the European elections

Until 9 June 2024, there had been only one political player in Hungary that completely defied political gravity. No matter what happened, the public's dissatisfaction with the government's handling of various key policy areas, the obvious corruption, the cosying up to the East at the expense of Hungary's Western alliances, and so on, Fidesz would win and win and win, mostly by overwhelming margins. Now, another player has entered the political arena, which seems unaffected by all the things that should weigh it down, including the personal scandals of the leading figure, the massive barrage of pro-government media attacks, the lack of resources, etc. However, none of these have put even the slightest damper on the surge of Péter Magyar and his Tisza party, the most conspicuous winner of the June 9 election.

Orbán and Magyar cannot coexist in the same arena with this aura for a long time. The European and municipal elections, with its numerous concurrent races, was just enough to ensure that Fidesz could emerge from this election with some measure of comfort despite losing considerable support since 2022. At the same time, Magyar could celebrate a huge win despite still being 15 points behind Fidesz. However, it must be stressed that given the weak state of the economy and the pervasive dissatisfaction with many public services, Fidesz's electoral returns continue to be stunning (Table 1).

Table 1. Some key election results from the 2024 EP and municipal elections in Hungary

	EP election result in % of party list votes (change from previous)	Budapest party list result in %	Budapest district mayoralties*
Fidesz-KDNP	44.82 (-7.74)	28.69	8**
TISZA	29.60 (-)	27.34	
DK-MSZP-Dialogue	8.03 (-14.5)	16.62	9
Our Homeland	6.71 (+3.42)	3.81	
Momentum	3.7 (-6.23)	4.98	2
Two-Tailed Dog Party	3.59 (+0.97)	7.89	1
Jobbik	0.99 (-5.35)	-	
LMP	0.87 (-1.31)	10.15	

Source: National Election Office, www.valasztas.hu

* Two further districts were won by non-partisan independents affiliated with the opposition, and one was won by a former Fidesz politician who had been expelled from the party and was running against Fidesz and opposition candidates

** Includes two independents supported by Fidesz

A comet out of nowhere

In February 2024, the ruling party's most severe crisis since 2010 began with a media report that a man convicted of helping to cover up paedophilic abuse had been granted a pardon by then-president Katalin Novák, one of two major politicians who have been forced to resign. This crisis spilt over into a broader crisis over an issue that few would have predicted to have such an intense impact on public life in Hungary. With Péter Magyar, a new player has appeared on the political scene in the person of the former husband of the other senior Fidesz politician implicated in the scandal, Judit Varga. Varga is a former minister of justice and was slated to lead the Fidesz list for the EP election in June.

Magyar accused Fidesz in general of corruption, and he named Antal Rogán, colloquially referred to as the "propaganda minister" in the Orbán cabinet, specifically as being involved in illegal activities. Magyar's accusations did not add any unheard-of elements to Hungarian public discourse. Many already believe Fidesz to be deeply corrupt and independent media regularly publish scoops about corruption. Despite ample evidence gathered by investigative journalists and some opposition politicians, these scandals have had no discernible impact on partisan preferences.

For some reason, Magyar's attacks on the government have caught fire, and within a few weeks, he has emerged in the public perception as a potential rival to the established party, vowing to launch a new political movement that would overcome partisan divisions in Hungary. A few months later, Péter Magyar's Tisza party won 30% in the EP elections and became a clear challenger to Fidesz.

A new dawn in opposition politics

So why was this a vital election? Since the collapse of MSZP and Gyurcsány began in 2006, which was almost twenty years ago, Orbán has not had such a potent challenger. In addition to its own huge base, Fidesz's dominance has also been contingent on the

fragmentation of the opposition and the lack of a large and dominant force outside Fidesz. No opposition party has received 30% of the vote since 2010, and the inability to amass a large coherent force has been a major obstacle for the opposition.

Péter Magyar proved not only that it can be done, but he did so in the span of just a few months and – this may be the most important insight of 9 June – with barely any resources. One of the key wisdoms of the era of Fidesz's dominance has been that the vast amounts of resources controlled by the ruling party are one of the most important components of its political hegemony. The disparity between the governing party and the opposition in terms of media control and campaign spending has always been immense. For example, Fidesz's social media campaigns on YouTube and Facebook have been among the most expensive in Europe. Despite the fact that Hungary is a relatively small and poor country by European standards, its ruling party is a lavish campaign spender even compared to the large parties in far bigger and richer countries, not to mention compared to the resource-deprived Hungarian opposition.

Then came Péter Magyar, who had virtually no money for billboards, ads, or paid activists, no propaganda media in his pockets, no professional campaign team, and virtually nothing that we associate with traditional campaigns. Yet he came closer to Fidesz than any opposition party had in decades. He managed to attract a very substantial proportion of those voters who had been opposition supporters already before he burst onto the political scene, and he likely also received votes from some former Fidesz supporters.

All of this is not to say that Magyar did not enjoy any benefits that other parties and candidates did not. Magyar received a media limelight that none of the opposition parties had even remotely experienced. All the media attention that Magyar received for free was worth far more than the advertising budgets of all the other opposition parties. Still, pointing this out does not negate the fact



that Magyar achieved the biggest political splash outside Fidesz in over a decade. He has reshaped Hungarian politics in ways that would have been inconceivable a few months earlier, and he has emerged as a genuine contender.

The Péter Magyar phenomenon is illustrative of several broader issues. For one, it shows that a discernible portion of the public is very hungry for political change and craves someone who can challenge Viktor Orbán. That craving is so strong that many are willing to line up behind a complete political novice without any track record or vetting. Second, Magyar's rapid surge highlights the weakness of the established opposition, which has been seen as incapable of posing a genuine challenge to Fidesz. Outside the massive force that is the Fidesz camp, the lack of an opposition that is perceived as potent enough to be an alternative government has created a massive vacuum in Hungarian politics that has sucked in and propelled to fame a second-tier Fidesz functionary based on a bit of political promise.

The weakened survivors

Magyar's appearance is a wildfire that has ravaged the Hungarian opposition landscape, leaving only a few players standing. Although it had expected to do better before Péter Magyar came along, the far-right Our Homeland has lost less of its support than the other opposition parties: its 6.7% was 3.4% better than its previous EP result and slightly higher than its tally in the national election two years ago (5.9%). Although it was not the breakthrough result that the party's chair, László Toroczkai had hoped for based on earlier polls, it was nevertheless evidence that the far-right has consolidated its base nationally and is likely to hang around even if Péter Magyar persists. Especially striking was the fact that in the vote for county assemblies, which are elected by rural voters living outside major urban areas across Hungary, Our Homeland was the second most popular party after Fidesz, often far outpacing the rest of the opposition (Péter Magyar's Tisza party did not compete for regional assemblies).

The other survivor of the Tisza-tsunami in the Hungarian opposition is the centre-left Democratic Coalition (DK). In fact, at 8.03%, it was the second-strongest opposition party after Magyar's Tisza party. Still, this implied a 14.5-point drop for the DK-led left-wing alliance (which included the Socialist Party and the green-left Dialogue party) since 2019 and a heavy blow to the party's aspiration to solidify its position as the strongest opposition party. The hope that DK might lead the opposition and nominate a prime ministerial candidate with actual prospects seems remote for now. In fact, while most of the opposition had cooperated with the Democratic Coalition before, it finds that the party that has drawn the majority of the votes cast for the opposition will not even cooperate with it, effectively marginalising DK in political life for now.

Although it failed to secure EP representation with only 3.6% of the vote nationally, for the time being, the satirical Two-Tailed Dog Party (MKKP) is also a survivor. It easily cleared the 5-percent threshold in Budapest, winning 7.9% of the vote in the capital. Even more importantly, party chair Gergely Kovács won a massive victory as the mayoral candidate in what was once the absolute Fidesz heartland, the elite 12th district in Buda. In the pre-Péter Magyar era, MKKP had hoped that this election would be its breakthrough in politics. That hope went up in smoke, but MKKP remains a force in Budapest, and its comeback cannot be ruled out.

Having missed the 5 per cent threshold in the EP election by a significant margin (3.7%), and even the Budapest assembly by a hair's breadth (4.98%), centrist-liberal Momentum, too, is fighting to remain relevant, and its own leaders have drawn the consequences as the entire party board resigned. Ideologically, Momentum is very different from Magyar or the other opposition parties, but it has lost the dynamism and the touch that once catapulted it into the limelight. During the campaign, it made a last-ditch effort to secure a small but firm base by branding itself as a liberal party (a label it had previously sought to avoid), but this was not enough to save it. Magyar, who occasionally described himself as a liberal but also embraces staunchly right-wing positions, siphoned off its support.

The municipal election

Since the Tisza party mostly stayed out of the municipal elections (it nominated three mayors in Budapest districts, but only because that was a requirement to field a party list in the capital), there was no major shift in the municipalities overall. Despite the significant drop in the share of the popular vote, Fidesz profited from the fact that in many municipalities, the opposition parties that had united in 2019 decided to run against each other. In the 25 larger urban areas called "cities with a county status", Fidesz won four it had lost in 2019 and lost three it had controlled, leading to a net balance of 15-10 in favour of the governing party.

In Budapest, green-left mayor Gergely Karácsony clinched an extremely narrow victory of a few hundred votes against Dávid Vitézy. Furthermore, he lost his majority in the Budapest City Assembly owing to the changes to the election rules for this assembly that Fidesz took in cooperation with Our Homeland (previously, the assembly was made up of the district mayors; now, party lists were competing for proportional representation).

While the right's plan succeeded in depriving Karácsony of his majority, it backfired spectacularly for the two parties that initiated it: Fidesz dropped under 30% in the capital, finishing barely ahead of Péter Magyar's party, a major embarrassment for the ruling party. Our Homeland, which had hoped to gain representation in the city parliament, did not even come close to the five percent threshold. Fidesz retained its dominance in the various county assemblies, although it did lose some seats (from 245 to 227) and its majority in the Pest County assembly.

Geographic patterns

The most important pattern of this election was the breakout performance of the Tisza party's EP list across Hungary and in all types of municipalities, including many rural areas where other opposition had previously failed to garner such high levels of public

support. Tisza came close to Fidesz in many regions and beat the ruling party in 60 municipalities across Hungary, although the majority was concentrated in the Budapest metropolitan area.

This coincided with a drop in Fidesz support, which was especially significant across municipalities with residents of 5000 or more in which the ruling party lost 9 points on average. Fidesz's losses broadly mirrored Tisza's gains, which were highest in the urban areas outside Budapest and lowest in the small municipalities under 5000. But even in the smallest municipalities with under 1000 residents, Tisza made impressive inroads for a new party, winning 20% support.

On average, Fidesz experienced the heaviest losses in the areas where its support has been traditionally very high, while it managed to slightly increase its support in some of the poorest regions of Hungary in the northeast and the southwest. On the plus side for the opposition, this shows that a segment of the traditional right-wing electorate views Tisza as a viable alternative.

However, this also implied that Fidesz was losing ground in areas where it generally had the biggest buffer in its bid to defend seats, while it has predominantly gained (albeit slightly) or held steady in areas where the left used to be strong. Even though Fidesz has lost support, its increased hold over the poorest areas in Hungary means that these regions have become harder for the opposition to reclaim.

Still, after many years, the opposition is finally in a situation of major internal transformation that at least holds out the potential prospect of achieving change in the Hungarian power structure.

2.2 | The opposition is now about Péter Magyar

As some polls have Péter Magyar's Tisza Party ahead of the ruling party, everyone is trying to solve the mystery of how one man seems to finally have the ability to potentially get the better of the seemingly invincible Orbán regime. However, the first mystery is which of the many contradictory polls even get it right: the disparity between the various gauges of public opinion is immense. As one would expect, there is some underlying logic in the diverging numbers. Nézőpont presents the most Fidesz-friendly figures (47% Fidesz, 37% Tisza), closely followed by Századvég (42% vs. 34%). Given that both think tanks are joined at the hip with the Fidesz government, that is only on par for the course.

Pollsters linked to the opposition present a different picture. IDEA gives the most prominent Fidesz-challenger a six-point lead (43% vs. 37%), as does Republikon (37% vs. 31%) and Publicus (42% vs. 36%). While the most recent poll of Zävecz also measures a modest Tisza lead (39% vs. 35%), this time it is Medián that leans far out of the window: it recently found a whopping 47%-36%, eleven-point lead for the main opposition party.

Running strong: Tisza has established itself

Given that most of their supporters are committed in their opposition to Orbán, the other opposition parties' remaining support is likely to decrease further if Tisza remains the most credible challenger. Moreover, while maximising the share of party-list votes is important, it is not the most important factor when it comes to a victory: if opposition voters end up voting tactically, opting for the most likely opposition candidate to win a given constituency whilst supporting whichever party list they prefer, then – in the case of a substantial lead for the opposition overall – that might be enough to propel Tisza alone or potentially the opposition overall ahead of Fidesz.

Regardless of the exact situation of the partisan preferences of the Hungarian public, this is a fundamentally new situation. It has been almost a year now that Péter Magyar has entered the political scene, and he has fundamentally reshaped Hungarian politics, and he has proven that he is not a fluke.

For years, many analysts have believed that the Hungarian party system was too entrenched to change suddenly or to allow for a new potent challenger to emerge quickly. Péter Magyar's meteoric rise and his persistence so far have proven the sceptics wrong. He goes into 2025, the last full year before the election, in a situation not seen in twenty years. In 2026, Viktor Orbán might well be up against a single challenger who has the potential to beat him, a situation he last experienced in 2006 – when he suffered a clear defeat.

For the established opposition, the situation poses a huge conundrum. With an ordinary Fidesz challenger, they would make a deal about getting a certain share of the seats and in return line up behind the leading force. Yet, Péter Magyar has been insisting from the start that there is no deal to be had with him, that these deals were a major factor in ruining the opposition's prospects in the last national election. Increasingly, the other opposition parties will have to take this declaration more seriously. Magyar's strategy of leading the opposition to the ruling party without any compromise with the "old forces" has undoubtedly yielded him more public support than that achieved by previous opposition alliances.

A one-man show

The main strategic challenge for the opposition, and more specifically its new leader, Péter Magyar, is whether he can continue running the entire campaign single-handedly as he did until now. In the first

few months after he launched his political career, it appeared – and he was saying so himself – that he simply did not have the time yet to build a new party organisation, with a visible team, deputies and potential successors.

What seemed like a temporary and incidental situation for a long time, namely his lack of a team with recognisable faces alongside Magyar's own, now appears like a deliberate strategy. Péter Magyar has still not tried to find other leaders who would participate in managing and leading the party in the second line behind him. At best, there are some background operators at work, but otherwise, no matter the issue, the party's spokesperson, on policy, democracy, and all matters is Péter Magyar, the only public face of the Tisza party.

Filling the political vacuum

Given this single-minded focus on Péter Magyar, what would happen if for any reason he became unavailable to compete in 2026? That is anyone's guess. The two major speculations are that if there is enough time available, a new opposition candidate could emerge and take Péter Magyar's place at the helm, without giving the old parties time to regroup and getting their supporters back. The underlying theory is that the vast majority of opposition voters were only waiting for a credible candidate to finally channel their frustration with the established party system – Fidesz and the pre-existing opposition parties included – and that Péter Magyar was just the right person at the right time, being sucked into this vacuum of needs. This would make him personally easily replaceable, as long as the replacement had some basic characteristics such as charisma. Under this scenario, the opposition is less vulnerable to Péter Magyar being taken off the chessboard, as long as there remains enough time to present the new candidate to the public.

The other theory is that the entire Magyar/Tisza phenomenon is a house of cards that will collapse immediately without Magyar propping it up. If that is true, then the disappearance of the magician

who has united a previously disjointed opposition could leave the anti-Orbán front as splintered as ever before, with the result that Fidesz would cruise to re-election even if – and that is a key clue – its public support slides substantially as compared to 2022.

Be that as it may, for now Péter Magyar is the only game in town for the opposition and this is most obviously manifest in how little the other opposition parties are fighting back against their gradual relegation into oblivion. Even as Péter Magyar has proclaimed that the old opposition is not fundamentally different from the ruling party, and Fidesz treats the new challenger as an enemy – as it always has treated potent challengers – parts of the pre-Tisza opposition are fawning, others are stoic, while even the critics behave more like frustrated ex-partners throwing shade on the new lover. They do not get what the attraction is all about but generally speaking they did not join the Fidesz propaganda machine in trying to destroy Magyar.

There is still numerous scenarios left open for Péter Magyar and his Tisza Party, and many come with question marks attached and raise vital issues that the candidate has not yet addressed in a manner that would fully satisfy those who want to make an educated choice rather than simply banking on his reliability as a person. A key question that Magyar has not yet given a clear answer to is what would happen in a scenario when neither Fidesz nor Tisza have a majority in parliament because some of the other parties pass the threshold. Interestingly enough, citing the Tisza MEPs' voting behaviour in the EP, both Fidesz and the Democratic Coalition have accused Péter Magyar of being in league with the respective other side, which highlights how easily manipulable this indicator is when it is used selectively.

Defying conventional wisdom

Conventional wisdom has it that before running in 2026, Péter Magyar will need detailed policy plans and a granular manifesto going into the election. He probably does not, and he may not go



into the details of every public policy area during the campaign. It is clear enough what he stands for, thus his argument, and while it is not true at all, it works with voters for now. Conventional wisdom has it that he will need a party organisation, a network of paid and volunteer organizers and talking heads who can multiply his message. Maybe not. Péter Magyar is the message, and it seems that gradually, voters are finding out about him and are becoming interested even without activists who come knocking. Conventional wisdom has it that you need lots of money to run a successful campaign, but once again Péter Magyar's EP campaign and his ongoing surge in the polls refute this. Fidesz is the party that tends to advertise most on YouTube and Facebook in Europe despite the fact that there are far richer countries with far larger electorates to reach. Tisza, by contrast, is among the major parties with the least amount of advertising thus far – although it does get a lot of free media coverage, some of which is actual deliberate advertising, its detractors insist.

And thus far, Péter Magyar also has appeared to benefit from all the negative attention he has received from the pro-Fidesz media. To the ongoing frustration of the ruling party, the all-out attack on Magyar has not had any discernible impact on the popularity of the challenger.

Another Teflon man

Donald Trump once famously quipped that "I could stand in the middle of 5th Avenue and shoot somebody, and I wouldn't lose any voters, OK?" In Hungary, the politician who could make a similar claim was Viktor Orbán, who has not been damaged by the massive corruption in his coterie, much of which could not have happened without his knowledge and assent. Now, finally, Fidesz appears to have found an opponent who seems made out of Teflon just like Orbán. Many years of cynical messaging about lacking accountability have had an impact not only on Fidesz voters but on other voters, too: even if credible evidence surfaces that Magyar is prone to aggressive behaviour that can turn violent, and that he is

deeply repulsed by the average citizen whose votes he courts, all that has not been able to put a discernible dent in his meteoric rise. So after dismissing him as a nonentity for a long time, Fidesz finally finds itself compelled to take the Magyar phenomenon seriously, with even Viktor Orbán attacking Magyar in comments to the media. It appears the prime minister does stoop to that level.

The ruling party's ingeniousness should never be underestimated, and if anyone knows what they are capable of, it is Péter Magyar. He has indicated often that he knows what's coming. It remains to be seen whether he is prepared for sustained provocations and attacks that span years.

2.3 | Outlook on the Hungarian opposition in 2025

If 2023 was the low point for the opposition since 2010, 2024 has been its high point so far. In our previous forecast, we wrote: “Looking at the bright side for the Hungarian opposition, one might say their situation can hardly get worse. But the truth is that it could.” And while for many in the established opposition a kind of worst-case scenario unfolded in 2024, the truth is that for the opposition overall, things shaped up pretty well last year.

While there had been fleeting moments of hope before, especially the municipal elections of 2019 and the end of 2021 with the successful conclusion of the opposition primaries, neither of these was on par with what Péter Magyar and his Tisza party have achieved. For the first time in 20 years, there is a single party in Hungary that could challenge Fidesz without forming uneasy alliances that tarnish its brand. This is a monumental change.

One might say that this was the easy part, replacing a few parties that had essentially lost their drive after 2022 was not a major achievement. But it was. Only one other party had achieved something similar in the 30+ years of post-1990 democracy in Hungary: Fidesz, when it decided to pick up the pieces of the old right after the Socialist Party (MSZP) shattered the right-wing parties in the 1994 elections.

It took years for Viktor Orbán to establish himself as the firm leader of the political right in Hungary and a viable opposition to MSZP, whereas it took Péter Magyar only four months to achieve the same on the other side of the political spectrum – as a conservative appealing predominantly to left-leaning and liberal voters, along with disappointed former Fidesz supporters. Moreover, throughout

the last year, he has already experienced much of the worst that Fidesz has to offer, as he was the target of a relentless and vast character assassination campaign by the Fidesz media empire. Thus far, he has not only survived but thrived.

As a result, going into 2025 he is the only game in town in opposition politics, with the other parties hanging on only in the hope that Magyar’s efforts will collapse suddenly by some impulse or the other before 2026. It is only natural and logical that they should expect this, but it is not the more likely scenario now. For the opposition, the better (and more likely) scenario is that of Magyar consolidating his position further in 2025 and genuinely challenging Fidesz in 2026. In Magyar’s mind, it is imperative to avoid making a deal with the “old” opposition. Even bringing their diminished voter base into Magyar’s fold in return for some reserved positions in the nascent Tisza movement would be flirting with disaster.

Some commentators will say that Magyar will not be able to dodge the real difficult questions concerning his potential rise to power, such as the issue that has plagued the opposition for several years now: will they adhere to the laws created by Fidesz to hem in an opposition-led government in or are they going to violate existing laws by invoking the presumably undemocratic genesis of the latter, especially by changing so-called cardinal and constitutional laws (which require supermajorities) with a plain majority? Will they replace the attorney general and other key figures at the helm of the deep state even if, legally speaking, they won’t be able to? Will they seize the assets of those who have come by their fortunes through the misappropriation of public funds? And so on.

However, Magyar does not necessarily have to take a stance on these issues. He has been vague and noncommittal on many issues that have arisen in 2024. Like the many personal attacks and scandals that the Fidesz communication machine has thrown at him, this has not visibly hurt his standing. Magyar is going through this campaign much like Viktor Orbán, the politician he sees as a role model in many respects, did in 2010. The less you say, the less you are likely to put some people off.

The most likely expectation going into 2025 is that Péter Magyar will avoid being pushed into the role of a traditional politician and avoid doing many of the things that are expected of him. Thus far, he has fared well in rejecting conventional wisdom on how politics works.

Péter Magyar himself is aware that his emotions may get the better of him, and this problem will continuously haunt him. There are many pitfalls until the next elections, ranging from becoming too interesting by some sort of scandal that can no longer be ignored all the way to becoming uninteresting, the novelty wearing off without some new aspects emerging. The next year will mark a long and treacherous path to the potentially first genuinely competitive election in two decades.

3

Hungary's place in the world in 2024

3.1 | The state of Hungary-EU relations

In his relentless quest to make the European Union bow down before his increasing authoritarianism at home and his desire to force his controversial foreign and other public policy line on the EU, 2024 has been a mixed year for Viktor Orbán. His assumption of the rotating Presidency of the Council of the European Union was supposed to mark a major step in the Orbanisation of the EU's foreign policy. In the end, it mostly turned out to be just another example of the Hungarian PM continuing with his propaganda about diplomacy towards Russia, a firm rejection of Ukrainians' aspiration to drive Putin's troops out of their homeland, but without any radical redirection of core EU policies.

The target of the "occupying Brussels" rhetoric was never Brussels anyway, though. Viktor Orbán will not have much influence on whether that happens; it will be decided by voters in France, Italy, Germany, and other influential EU member states where right-wing populists of Orbán's ilk seek governmental participation. When Orbán or his spokespersons talk of occupying Brussels and overthrowing the "decaying" liberal world order, that rhetoric is aimed at friendly domestic and international audiences, not the Brussels elite.

When Orbán's government unveiled its motto for the Hungarian presidency, he set the tone for the entire half-year term: "Make Europe great again" was a message that Orbán just could not refrain from, showing his lack respect for a position (the rotating presidency) designed to foster consensus among the member states. Instead, he used the rotating presidency as just another platform to highlight how far the Hungarian government has drifted away from the scope of a potential European consensus.

Despite Orbán's efforts, the European populist right remains divided

While Viktor Orbán's message to domestic audiences is that he is increasingly a leader of great stature at the European level, a force to be reckoned with, the local public is less aware of how crucial it is for Orbán to translate the intense diplomatic and media attention surrounding his behaviour – often perceived as scandalous by Hungary's traditional allies – into actual political influence at the EU level.

The project of building a unified populist right at the European level has failed once again for now. Orbán did achieve one notable success after the EP election that many critics initially thought he might fail at: he was a driving force behind the creation of the Patriots for Europe group in the European Parliament, which includes the largest French opposition party, Marine Le Pen's National Rally, along with several other major far-right parties such as the Freedom Party in Austria, the League in Italy, ANO in the Czech Republic, Vox in Spain, the Danish People's Party, among others. The group also spans a wide ideological spectrum from more pragmatic parties, such as ANO, to staunchly far-right formations, such as the Portuguese Chega, the Spanish Vox, or Vlaams Belang in Belgium.

Yet other parties that would be critical elements of a powerful populist right-wing coalition in Europe have opted to stay out. Most importantly, the Brothers of Italy, the party of the Italian PM Georgia Meloni, has chosen not to ally itself with the Patriots, as did one of Orbán's closest allies in the EU, the Polish PiS party. Another vital European populist player, AfD, which had tried to seek Orbán's graces, has been rebuffed by Fidesz after an early effort at friendship.

Ultimately, Orbán's rejection of the friendly relations with the German far-right party was a sign not of policy disagreements but of his remaining pragmatism. Hungary is heavily dependent on Germany economically, and while the Hungarian PM's relations with the mainstream German parties are fraught, he seeks to avoid going a step too far by openly aligning himself with the AfD. This is also a realistic assessment of AfD's chances of entering the government soon. Orbán has no hesitation in offending mainstream parties in France, for instance, because his political allies might gain power there.

His influence in the Patriots EP group is manifest in the fact that the Fidesz MEP Kinga Gál is the first VP of the group, ranking immediately behind Marine Le Pen's Jordan Bardella. Fidesz is recognised for its role in catalysing the largest far-right formation in the European Parliament. Yet, it is also obvious that Viktor Orbán has thus far not succeeded in either of his grand European ambitions: the European populist right remains deeply divided, "Brussels" continues so far on a mainstream political course, and Orbán himself is far from being the universally recognised leader of the European right.

Even the provocations largely fell flat

Nor did Orbán's provocations as the "president" of the EU trigger the kind of intense reactions that might have been expected. His "peace mission", including a surprise visit to Moscow and meeting with Vladimir Putin did indeed shock other EU leaders (it probably should not have, given how strongly Hungarian diplomacy has aligned itself with Russia). Still, ultimately, the EU refrained from the potentially far-reaching consequences that were discussed in the heat of the initial moment. Sitting Hungary's presidency out became the unofficial motto of his term, which meant that after his forceful introduction, most European citizens saw very little in the news about "President Orbán". This was also possible because, as had often been the case, the legwork of the presidency produced by the Hungarian public service was supposedly all right at a technocratic level.



Moreover, the EU itself was not in a state where it needed much steering or even help from the rotating presidency. Coming right in the wake of the EP elections, the EU leaders in Brussels were far more preoccupied with bargaining over the new European Commission and the constitution of the new European Parliament than focusing on policy coordination, which would have been a key role for the country holding the rotating presidency. In that respect, the timing of Hungary's second brief term as the rotating president was fortuitous for the mainstream elite in Brussels and maybe for Orbán, too.

What about the EU funds?

Although Orbán did not shy back from major provocations, he did hold back from openly drowning the second semester in full chaos, which would have forced the other member states into taking the unprecedented step of effectively stripping Hungary of this position. The EU did not want to do that for fear of turning Orbán into a martyr, but avoiding this dramatic scenario also hinged on the Hungarian minister not crossing every line until the situation boiled over.

Part of Orbán's calculus in holding back from going all out in sabotaging the EU's operations might have been a desire to preserve some hope of claiming the vast amounts of EU funds that Hungary still has no access to because the European institutions are concerned about the rule-of-law and corruption situation in Hungary. Although a tranche of EU payments was released in exchange for Orbán opening up the path for aid to Ukraine and towards the beginning of the besieged country's presumably long and treacherous road towards EU membership, large segments of Hungary's funds will remain frozen until the EU is satisfied that the Orbán government has complied with the so-called super milestones.

The dilemma for Orbán has been the same for a while now. His government needs that money for a variety of purposes: as grease to keep the crony capitalist system running as well as a source of GDP growth, no matter how inefficiently the money is used because of the pervasive corruption. As Hungary stumbles into a recession

with no end in sight, and the forint is persistently hovering over the mentally sensitive 400 forints to a euro exchange rate, a money infusion would be very much needed by the Hungarian economy, not to mention Orbán's oligarchs, who are clamouring for EU money to realise pet projects.

Theoretically, both sides have a strong interest in finding a compromise. As irksome as Orbán's provocations, vetoes and anti-EU communication campaigns may be, the fear that his further alienation could set unpredictable centrifugal forces in motion is greater still. There is a massive incentive for the EU to offer Orbán a road back into the tent he has left rambunctiously whilst slamming the door behind him.

Can they live and let live? And at what price?

From the EU's perspective, there must be a *modus vivendi* with Orbán as long as he leaves some room for a compromise, and for the time being, a workable live-and-let-live approach would allow the Hungarian PM to consolidate his gains in the Hungarian constitutional system. For his part, Orbán must also square a difficult circle: he wants the money and he also wants "Brussels" to serve as the most palpable outside evil force that he must battle to maintain his street cred as a "fighter" with the Hungarian public. While the European Union is a machine built on compromise and cooperation, Orbán's political success is rooted in domination, forcing submission, and a symbolic forever war. Politically speaking, he simply cannot afford to be on good terms with the European Commission, and he has reconstructed his entire political persona around the idea that he is the anti-Brussels politician: that is not something he can easily abandon, nor has he shown any desire to do so.

Despite hopes that in the interest of securing EU funds, Viktor Orbán would engineer some subtle turnaround and quietly adopt a slew of legal amendments that would formally satisfy the EU milestones and thus give Hungarian democracy – and especially the judiciary –

some breathing room, that is not what is happening right now. The most recently proposed amendments to the judicial system are a provocation, although that is not their main goal: their main goal, as recognised by many protesting Hungarian judges, is to further push the judicial system into political submission to the ruling party.

And it is a typical piece of manipulative Fidesz legislation in that formally speaking, it satisfies the requirement of having been drafted in cooperation with the professional body representing the judiciary, the National Judicial Council. In a close 8-7 vote, the latter decided to acquiesce to the government's demand for greater authority over the assignment, transfer and promotion of judges, which made many in the profession fear for their remaining independence.

Blackmail, plain and simple

But apart from Fidesz loyalists on the National Judicial Council, everyone was under pressure to submit because judges had not received a pay raise in a while, and thus Fidesz offered the carrot together with the stick: the package chipping another major block of the independence of the Hungarian judiciary will raise their pay, and the government made very clear that the two issues had been inseparably linked – there would be no money forthcoming unless the judiciary allowed itself to be pushed around by the government.

Given that the formal requirement of consulting and securing the assent of the relevant professional organisation has been met, even as the EU values have been substantially undermined by the very same actions, it remains to be seen how the European Commission reacts.

Doing as little as possible to get the most possible

The Hungarian government, for its part, is trying to get away with its usual approach of getting the money while sticking with the

key elements of its state capture plan. Viktor Orbán continues to push for receiving the funds – he argues that this money is owed to Hungary – but rather than trying to satisfy the Commission's demands substantially, he is instead threatening the EU to essentially cripple it with vetos to come. In the meanwhile, the government is quietly planning for at least a long delay in the arrival of large portions of the funds allocated to Hungary during the ongoing budget cycle, and in line with the policy of growing "connectivity", Orbán's government is also trying to deepen ties to Asian powers as a source of alternate funding.

Viktor Orbán also hopes that Donald Trump's entry into office will shore up his position. Until now, the US administration and the EU leadership struggled shoulder-to-shoulder in trying to pressure the Hungarian government to return to a pro-EU and pro-NATO policy line. But now, as the Hungarian PM keeps emphasising with delight, that alliance has fallen apart. Given Europe's excessive reliance on the United States for its security, Trump could help Orbán a great deal if he used this leverage to pressure the EU into letting Orbán be. How much political capital he will actually expend on his most loyal European ally remains to be seen.

Mainstream politics in the EU lives to fight another day

For the time being, a success for mainstream politics in the EU has been that Ursula von der Leyen, another European leader designated as an alleged archenemy of Hungary, can continue to lead the European Commission. The EP election failed to achieve a massive breakthrough for the European far-right, and so far, the mainstream parties that Orbán continuously rails against control a majority in the EU institutions: both in the EP, the European Commission and the Council as well.

Nevertheless, the most entrenched leader in the European Council is still the Hungarian prime minister, and it is undeniable that his position is better than it was at the end of 2023. Even with his

most important ally, the Polish Law and Justice Party, dropping out of office, Orbán is less isolated than he was a year ago. And as France descends into a deep political crisis thanks to the erratic actions of President Macron, Marine Le Pen, another key Orbán ally in Europe, is waiting in the wings: her election would be an unprecedented success for Orbán, surpassing in importance the election of Giorgia Meloni as Italian PM. While the jury is still out on many questions, 2024 has not been a bad year for Viktor Orbán in terms of foreign policy.

3.2 | The Trump tide shifts Orbán's boat

In 2024, Viktor Orbán went all in in his bet on Donald Trump, and for the second time, he succeeded despite odds that were far from certain (though certainly better than in 2016). Not only did Trump win, he won with a clear majority that renders moot any doubts about his mandate. Trumpworld, and one of its most prominent global representatives, Viktor Orbán, portray Trump's second victory and unlikely comeback as a comprehensive rejection of liberalism, inclusivity, climate-aware policies, rule-of-law concerns and socio-economic equality, to name but a few pre-eminent catchwords that the populist right has honed in in recent years.

Orbán called it again

As ever so often before, Orbán has spited the critics, and as so often before, he has succeeded. As analysts, we must also point out that this was a huge gamble: had Kamala Harris won, Orbán would have faced another four long years being frozen out of the circle of trusted US allies. However, Orbán realises what many analysts do not consider when discussing the dismal state of Hungarian-US relations so far: in terms of the day-to-day survival of his regime, which is the only relevant consideration for him, bad relations with a US administration are not a fatal blow. In fact, despite all the losses, they also bring a political bonus: the open disdain of a foreign policy establishment that is committed to a liberal world order meshes well with Orbán's narrative of the conspiracy of the global liberal elite that wishes to control Hungary and Europe.

The outgoing US ambassador to Hungary, David Pressman, has done what he had to in order to clearly represent the values that his administration, large segments of the US population, and many Hungarians, too, are committed to: he stood up for fundamental values that should be beyond dispute in a democracy. Yet, by

assuming the role of the democratic (small d) American critic of the Orbán government's increasing authoritarianism, Pressman also helped embody the caricature that the Orbán regime seeks to convey to the Hungarian public about the liberal elites that allegedly wish to control Hungary and limit its government's sovereignty (read: its freedom to erode the rule of law and the rules of democracy). Pressman's "transgression" was calling a spade a spade, but in a public discourse that is governed by the rules of newspeak, that plays into the hands of propagandists.

One way of looking at Orbán's all-in commitment to the ultimately victorious Trump is that the Hungarian prime minister is a strategic genius who has a feel for where the world is headed, and he is arranging his tactical commitments to track the broader trend. But the most important reason that Orbán's gambles work out spectacularly sometimes is not his astute tracking of the politics of other countries and his sense of where things are headed in each and every election. Thus, he also bet on Bolsonaro to win a second term, he has endorsed Marine Le Pen and her party, he backed Trump in 2020 as well, he was a vocal backer of PiS in Poland, of Janez Jansa in Slovenia, and of the Gruevski regime in North Macedonia; he lost all of these bets. In addition to capturing the broader trend, Orbán's other key asset is time. He has cemented himself so deeply in his office that he can simply wait for fellow populists to win, which is becoming increasingly frequent. When you are in a casino and you are always betting red, given enough time that should be the winning strategy in about 50% of the cases. Orbán's record in major elections may now be over 50% due to the historical tailwind, but time and the lack of democratic accountability at home has been his most important strategic asset: he can simply wait for the tide to turn his way and then cast himself as a prophet.



Good timing

Slowly, but time appears to be doing what it is meant to do, and after a string of critical victories by leaders who are inclined towards Orbán – Georgia Meloni in Italy, Javier Milei in Argentina, Recep Tayyip Erdogan in Turkey, Robert Fico in Slovakia – with the second Trump victory in eight years, the Hungarian prime minister can now claim the most critical notch in his belt, at a sensitive time, too. As the EU and NATO leadership has been increasingly frustrated with Orbán's pro-Russian and pro-Chinese course, the Hungarian PM's strategic isolation had become increasingly pressing. Given the former and new president's well-known sympathies for Orbán, the new foreign policy leadership under Trump can be expected to relieve massive pressure on Orbán in the global realm, but in fact to join up with the Hungarian maverick in pressuring the EU to follow a foreign policy line that is largely (a key qualifier to which we will return below) in line with Orbán's own foreign policy vision.

Most importantly, Orbán has been envisioning for a while now that Donald Trump will change the dynamic of the war in Ukraine, where the West has presented a united front in supporting the country attacked by the Russian aggressor. Orbán has been beholden to Vladimir Putin for a long time, and he has been relentlessly arguing for the West to end the sanctions imposed on the Russian regime and to pressure Ukraine instead to cede territory in exchange for security guarantees. The "peace" envisioned by Orbán would be an armistice that would allow the Russians to entrench themselves deep in Ukrainian territory and gradually erode the stability of the rump-Ukraine left over after a Putin, Trump and – potentially – Orbán brokered "peace" deal.

How profound will the changes in US foreign policy be?

Among a slew of highly controversial cabinet-level nominations, Trump's selection of Senator Marco Rubio of Florida as his Secretary of State was the most conventional choice and the one

which suggests that the basic tenets of US foreign policy may not be entirely thrown overboard. Although Rubio is less hawkish on Russia – and thus a less dependable ally of Ukraine – than he is on China or Iran, he is by and large interested in a muscular US foreign policy and a willingness to engage strategic challengers – and Russia is nothing but.

Still, while someone closer to Tucker Carlson would have served Orbán better in the State Department, it is clear now that at least in the short term (and probably in the long term too), Orbán will be shored up by the US in his dealings globally and in Europe. The fact that the majority of Americans voted for Trump is also succour for Orbán in that he can say that it is the American people who have endorsed the same agenda that he has pursued, thus giving his views the imprimatur of the most powerful democracy in the world.

Winning, but within reason

It is also important to that while Viktor Orbán claims that he wants to change the entire EU leadership, which is really more of a theoretical aspiration than an actual goal. With the US now controlled by a powerful but remote ally, Orbán cannot afford the potential total elimination of all the enemies he has. His regime largely runs on the fumes provided by the caricature of Hungary's western allies as decadent Sorosist leaders whose main goal is to destroy Europe and turn it over to hordes of migrants. This allows Orbán to shine as one of the last defenders of Christianity and European civilisation. And as fictional as it may be, he needs that role desperately because he has otherwise very little to show for 15 years of unlimited governmental power.

At this point, the Hungarian economy is doing persistently so much worse than most of the rest of Europe that in reality, it is difficult to explain these figures other than with economic mismanagement and incompetence. For Orbán to avoid being held accountable, there needs to be an alternative reality where the problems are caused by the liberal villains; if most of Europe were led by like-minded

leaders, as is the case of the US right now, then it would be far more challenging to defray responsibility.

Orbán tries to intensify ties to China while underplaying their role in public

Another potential source of risk for Orbán is his relentless effort to cultivate the favour of the Chinese regime. What could spell trouble for Orbán and his idyllic relations with the incoming Trump administration is that the Hungarian side is very strongly focused on maintaining good relations with China, too.

In terms of Hungarian public discourse, for the time being Orbán's intense courtship of China has been relegated to the background. Thus, for example, there is no more open talk about bringing Fudan University to Hungary, despite the fact that the government previously burned significant political capital on this unpopular proposition. But there is also no indication that the less vocal professions of loyalty mean that Orbán has shifted course on China. He is still set on putting Hungarian foreign and trade policy on an entirely new footing, with China emerging as a major partner and diversifying Hungary's economic dependence.

How will Trump treat China?

This has the potential to put a damper in the lovefest that we are about to see in US-Hungarian relations. The designated Secretary of State, Marco Rubio, is very hawkish when it comes to China, and his views mirror that of the new Republican establishment, which wishes to pivot American foreign policy from its current focus on Russia and its war in Ukraine to China and its aggressive military and trade policy. For now, as the new administration is waiting to take office, this is mere rhetoric, and Hungary is virtually invisible in the foreign policy matrix that captures US-Chinese relations.

A potentially hazardous scenario is a showdown between the Trump administration and China when Trump will expect his global

loyalists to stand and be counted. Even for Trump, Orbán will not. As he has stood with Vladimir Putin through the worst aggression on the European continent in decades, he is not expected to give up the battery investment and other incipient deals with China, not for Trump nor for anyone.

However, for the time being a scenario where China could truly emerge as a source of tension between a Trump administration in the US and Viktor Orbán's government in Hungary still has a low likelihood. It is not clear that Trump will follow up his rhetoric with concrete actions that might give rise to real tensions, nor is it obvious that even if the latter scenario materialises, his foreign policymakers will not give Orbán a pass on account of him leading a small and largely inconsequential economy, along with Trump's personal penchant for the Hungarian leader.

So in all, 2025 is shaping up to be a great year for Viktor Orbán's foreign policy. Even until now, Orbán has been very self-confident in his dealings with the EU, but he will likely become even more emboldened now that he will have American backing. Do not expect 2025 to be the year when Viktor Orbán's foreign policy becomes more apologetic or consensus-oriented at the European level.

As its strategic interests dictate that it must brace itself to take on greater responsibility in Ukraine to balance the anticipated reduction in US assistance, the EU will also have to contend with an emboldened Viktor Orbán. How this uncomfortable scenario will play out is anyone's guess at this point, but 2024's shift has shown most conspicuously yet that as the populist tide rises and sweeps a growing number of Orbán's friends into office, time has emerged as a key ally for Viktor Orbán.

3.3 | Outlook on Hungary's place in the world 2025

In the international arena, 2025 has the potential to be a good year for Fidesz, although there are also risks. As of January, the global stars will align for Orbán like they last did in 2019, when his political allies and personal friends were in power in both Russia and the United States. Moreover, the relations with China were friendly, too. Obviously, Putin has remained in power all throughout, but in 2025, Trump will not only be recently re-elected but also far more popular and have a mandate, unlike the one he had in the 2016 election. Moreover, the Hungarian government's relations with China and Xi Jinping have also improved, even compared to the previously favourable position.

At the same time, Orbán did not have the Ukraine war hanging around his neck in 2019. Although he has used that war to great effect in domestic politics, convincing a large segment of the electorate of the slanderous claim that the opposition wants to insert Hungary into the war, the issue nevertheless remains a drag for his relations with most EU and NATO member states.

Still, there is some relief on the horizon for Orbán. The attrition in pro-Ukrainian attitudes worldwide has led to a resigned thawing in the public ire regarding Orbán in any case. Even more importantly, Trump's re-election to the US presidency comes at a crucial time for Orbán: the incoming new American commander-in-chief, with his intense affection for the Hungarian prime minister, could take massive diplomatic pressure off Orbán if he opts to exercise his considerable leverage with the Europeans on behalf of the latter.

And even if Trump decides not to because Orbán is just not important enough to spend political capital on, the fact alone that there will no

longer be any pressure from the US will be a relief for the Hungarian PM. Moreover, while Hungarian voters are not substantially concerned about foreign policy, a visit with Trump in the White House, along with supportive comments for his policy, would be a boost for Orbán; Fidesz would portray these as vindication after years of hostility from the White House.

Although the Hungarian government has lost some crucial allies over the past years, including the PiS government in Poland, Jair Bolsonaro in Brazil and Janez Jansa in Slovenia, it has also made key gains, including Robert Fico in Slovakia, Javier Milei in Argentina and most recently Donald Trump – these more than balance the “losses”. Orbán's carefully nurtured friendship with the French far-right under Marine Le Pen might also pay off in the coming years, given the crisis in France, maybe even before the scheduled election.

Expect Orbán to try to shine with his global network of fellow populists in 2025 and to use them to highlight his standing as an internationally recognised statesman. How the strength of this network shapes up is out of his control, but he can potentially use the influential populist figures in place to secure money, get good photo ops for domestic use, and pressure the EU into letting him do his thing in Hungary without withholding money. Of these three goals, the third one is least likely to be realised. But even if Orbán does not achieve a full financial breakthrough, with a tailwind from Trump, he could achieve progress. European foreign policy will have to adjust to the new reality of US foreign policy under Trump, and that will provide an opening that Viktor Orbán could exploit.

In terms of the potential negative scenarios for Orbán, Trump could decide that Orbán is not interesting beyond a photo op (especially if tensions with China increase – do not expect Orbán to sacrifice the goodwill of the Chinese government that he has cultivated over the past years), while the EU for its part might deduce from a Trumpian turn in US foreign policy that it needs to circle the wagons and move forward with those leaders who are reliable enough for the organisation of a joint foreign and security policy that treats Russia as a strategic threat. In such a scenario, Orbán will remain a dangerous “ally” for the mainstream of the European Union.

So, while there is a lot of uncertainty ahead for Viktor Orbán and the Hungarian government in the foreign policy arena, that is already a substantial improvement over the end of 2023, when growing isolation and its huge financial cost were the main prospects for the coming year.

Conclusion

Politically speaking, 2024 has turned out to be a far more exciting year than anyone could have predicted. Hope is back on the opposition side, which is no small feat given the mood of the previous years. Before February, the only question was whether, in the local election in June, the opposition would be able to hang on to the municipalities it had won in the 2019 election. The outcome of the EP election was not much in doubt; the only question mark in that context was the margin of Fidesz's eventual victory. What was not in doubt at all was that Fidesz was absolutely hegemonic in the Hungarian party system and that the opposition was in disarray. It was not only that the politicians representing the opposition were beyond redemption – more importantly, their voters seemed to have lost hope.

It took the span of only roughly four months from the appearance of a viral interview by Péter Magyar, the ex-husband of the former Fidesz justice minister Judit Varga, to upend Hungarian politics as we knew it. Magyar's sudden rise began in February on the heels of revelations that his ex-wife, the then-Minister of Justice Judit Varga, had countersigned the decision of the Hungarian president Katalin Novák to pardon a criminal who had been convicted of abetting the sexual abuse of children in a state-run children's home. Responding to the scandal underlying the resignations of Novák and Varga, Magyar launched a broadside against his ex-wife's party.

Péter Magyar accused the ruling party of systemic corruption, claiming that the national sovereigntist rhetoric was nothing but an effort to conceal the operation of the power machinery and the accumulation of incredible fortunes – using taxpayer money. Nothing in the interview was novel, its vague allusions to the abuse of power simply mirrored what the established opposition had been saying for many years.

There was a twist to this story, however. Péter Magyar was not an opposition figure, he was the model of a mid-level Fidesz apparatchik. His entire political socialisation was intertwined with Fidesz, and he was on friendly terms with several key young figures in the ruling party, especially Gergely Gulyás, the minister in charge of the Prime Minister's Office. Magyar had mostly worked for Fidesz in various capacities, lately managing state-owned enterprises while his wife's political career advanced more quickly.

Why exactly Péter Magyar's interview on the Partizán YouTube channel went viral is hard to say, but from Fidesz's perspective, it was a political conflagration of unfortunate events. Magyar's story was probably the right mix of tabloid – the ex-husband of the minister who had just resigned in a sordid scandal involving paedophilia – and politics, i.e. the corruption and propaganda issue. Furthermore, Magyar's comments filled the vast vacuum that had arisen on the opposition side after 2022 – there was suddenly hope where there previously had been none. And hope, as we know, is an incredibly powerful emotion, and it catapulted Péter Magyar into the centre of Hungarian politics.

By June 2024, Magyar, who had initially professed reticence concerning suggestions that he should enter politics, had firmly established himself as the leader of Orbán's opposition, winning a higher share of the votes than any other new party had within that timeframe by a considerable margin. By the end of 2024, Magyar has essentially squeezed out and rendered irrelevant all opposition parties other than Our Homeland on the far-right and the Democratic Coalition on the left. But those, too, are struggling to survive as Péter Magyar's Tisza party has emerged as a viable alternative to Fidesz, the first time that any single party has achieved this since the ruling party took the lead in the polls in 2006.

Some polls have Tisza ahead of Fidesz, while pollsters close to the government say Fidesz is still in the lead, but even they have seen Tisza grow stronger since the EP elections. More important than the specific figures is that, at this point, few would completely rule

out the possibility that Magyar could oust Orbán in 2026. This is an unexpected and absolutely vital change in Hungarian politics, especially as compared to 2023 when there were no signs that such things could happen.

Trying to solve the enigma that is Magyar's growing support despite the inordinate amounts of dirt thrown at him by the Fidesz media empire, the ruling party finds itself in a new situation. It is as if it were facing off against a younger, more dynamic version of Orbán himself. And while the image of an experienced statesman casually brushing off an inexperienced and undisciplined challenger worked exceedingly well in 2022, there is no sign yet that this will work in 2026.

Many voters experienced 2024 as the year of stagnation, with the economy failing to take off, prices stuck at a high level and rising further, and consumption levelling off. For many in Hungary, quality of life has not improved over the past years, while a significant minority find it more difficult to make ends meet. In 2025, Viktor

Orbán will have to deliver some palpable economic and quality-of-life improvements if he wants to be a shoo-in for another re-election in 2026. Experience shows that crises and moral panic are easier to engineer than economic development, so expect Fidesz to be continuously fishing for new crises, as it has done relentlessly since it entered office in 2010. In the last 14 years, we have had the economic, refugee, pandemic and war crises, all with their own special legal regimes that have given the government continuous emergency powers and the "mandate" to inundate Hungarian households with propaganda through every marketing channel available.

At the start of 2025, the ruling party is on the defensive, trying to neutralise Péter Magyar's aggressive publicity stunts highlighting the sad conditions in Hungary's public services. Yet Fidesz has lost its touch, as the efforts to discredit Magyar by confronting him in person end up causing embarrassment for the governing party itself. While Magyar's actions are clearly theatrical, that may well be the best method of laying bare the weakness of a regime that is based on theatrics above all.



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