

Press Freedom Index 2013



Mertek Media Monitor

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ABOUT THE STUDY

The research objective

Mertek Media Monitor has undertaken to survey and assess how the state of press freedom has developed in Hungary. We first compiled a press freedom index in 2012, which was based on the results of three research projects that were implemented simultaneously. In these projects we examined three populations: journalists, media managers (media owners, the managers of media corporations and the managements of media corporations), and - through a representative sample of the general public - we also surveyed the public's perceptions concerning press freedom. In our research we sought to find out how the three groups assess the state of press freedom, the way the domestic media operates, the nature of political and economic pressure on the press, as well as the social standing and role of the journalistic profession and the phenomenon of self-censorship.

We ran the research again on all three groups in 2013. The following is a comparative analysis of the data compiled in 2012 and 2013. The detailed analysis of the research on media managers was performed by the Publicus Institute,¹ and the observations in our analysis about managers are based on Publicus' work in that context.

Methodology

Through our research we sought to attain a comprehensive picture of how and whether the press in Hungary is free and how the Hungarian media work. Though the questions we asked journalists and media managers were of a professional nature, the general public was asked to respond to questions that did not require any specialised professional knowledge or journalistic experience. Correspondingly, the last category of respondents was given the lowest number of questions.

For the survey of the general public, answers were collected from a representative sample of the population, while this was not the case for journalists and media managers. Data collection for journalists was performed by Mertek Media Monitor; the research on media managers was conducted by the Publicus Institute; and the survey of the general public was undertaken by Medián Opinion & Market Research Ltd. The popular survey was conducted in July 2013 based on a representative sample of 1,200 persons. The research on the opinions of media managers took place in November 2013, and in all 46 managers responded to our questions.

¹ The analysis was published on Mertek's website (<http://mertek.eu>).

Since we wanted to reach the widest possible range of journalists, we sent our online questionnaire to print and online press outlets as well radio stations, television channels and public service media. We also strove to make sure that left- and right-wing media outlets both be represented in our survey. As we basically wanted to cover media involved in covering public affairs news, the tabloid press was not included in the sample. Respondents submitted their answers anonymously, hence we do not know the response rates of individual media outlets. The online questionnaires were filled out by 192 journalists. Fifty-six percent of respondents in the category of "journalists" worked in an eponymous position, 41% were editors, 0.5% were managers and 2% were owners. Almost three-fourths of respondents (72%) live in Budapest, 12% reside in county seats and another 12% in rural towns. The overwhelming of persons in the sample (90%) have a tertiary education degree. A plurality (41%) work in online media, 33% of them work for print publications, 11% in commercial television or radio and 2% in public service television. Responses to the questionnaire were collected in October 2013. The response rate is indicative in itself, since it appears that journalists in the print and online press are more open to attitude research than journalists working in television and radio.

We used a weighted to numerically present the evolution of numbers. Based on the method used by the weighted index, we recorded a score of -100 when we received a response of "not at all important", a score of -50 when the answer was "not important", and +50 and +100 for responses of "important" and "very important", respectively. Where we inquired about change over time, "deterioration" was rated -100, no change was given a score of 0 and improvement was worth +100 points.

We divided our general analysis into several topics and each chapter surveys one such subject matter. Each chapter contains a review of how the answers of the individual groups evolved and a concluding analysis at the end wherein we compare the answers received from all groups.

Please send your feedback, observations and questions about the study to Szonja Navratil (navratil.szonja@mertek). Alternatively, you may also share them on Mertek's website or Facebook page.

MAIN CONCLUSIONS

Even though the public's opinion of press freedom and the way the media work are virtually unaltered, the respective opinions of journalists and media managers have changed, in diametrically opposed directions, though the magnitude of the changes is not significant. Journalists tend to view the media's situation as worse than in 2012, while media managers see it as slightly improved.

General public

Just as in 2012, the general public considered the state of press freedom as slightly below the middle value (4.6) on a scale from 1-10. Popular views were particularly characterised by a lack of change, as well as the fact that respondents' party preferences had a substantial impact on how individuals assessed the current situation of press freedom. Neither the overall perception of press freedom nor the public's assessment of the role of political and economic pressure has changed over the past year. The most potent explanatory variable underlying the evolution of opinions is party preference. Answers are most strongly influenced by whether the given respondent supports the governing parties or the largest opposition party. We found no explanation that would help understand why the public perceives an improvement - albeit a slight one - in the public esteem of journalism or in the quality of public media services.

Journalism

One of the most pronounced characteristics in the evolution of journalists' opinions is that in virtually all aspects their outlook is worse than in 2012. Though this change is not substantial in any of the dimensions, it is almost evenly distributed across issues. The state of press freedom is considered somewhat worse than the middle value (4.3), but with a 0.5 point change this is not a significant decline. Among the factors through which press freedom is realised, political independence continues to be considered the most important, but professional independence, too, is gaining in significance, as the importance of professional organisations has increased by 20 points. It seems that journalists are well aware of the phenomenon of soft censorship, as the direct ties between media and political parties have dropped 10 points in terms of their relevance for press freedom, while the transparent spending of state advertising funds has emerged as the top issue. "By soft censorship we mean the use of state advertisements by the governing party for the purposes of supporting friendly media outlets, particularly those led by businessman close to the government."²

Journalists also perceive that economic pressures have increased somewhat, while political pressure has grown by 15 points. In 2013, the share of those who perceived that political pressure had risen to heights that effective curtail press freedom had climbed to 48%.

² Mérték Médiaelemző Műhely: Széliden foglyul ejteni, Öncenzúra és az állam szerepe a magyar médiában, [Capture softly – Self-censorship and the role of the state in Hungarian media] (forthcoming).

There were also more journalists who had engaged in self-censorship. While in 2012 "only" 22% of responding journalists admitted to having concealed or distorted political or economic facts, by 2013 this ratio had increased to 34%.

Media managers

Managers' views have also shifted only slightly since 2012, but in their case the trend was positive and their assessment of the state of press freedom is more favourable (6.2). In line with journalists' opinion, they regard political independence as the most important dimension of press freedom. At the same time media managers consider that the degree of political and economic pressure on the media has declined since 2012. While in 2012 37% of media managers held that political pressure on the media had reached levels that impair press freedom, in 2013 the proportion of those who shared this view had dropped to "only" 26%.

1. PRESS FREEDOM INDEX

We asked respondents in all three groups about the current state of press freedom, and rated their answers on a scale of 1-10.

Media managers tend to have a somewhat positive view of the state of press freedom, since using the 10 point scale they gave it an average of 6.2 in 2013. The view of the general public (4.6) and of journalists (4.3) lags slightly below the middle value.

Interestingly, perceptions of press freedom have evolved differently over the past year in all three of the groups investigated. While there was no change in the views of the general public, media managers saw an improvement and journalists a deterioration of press freedom since 2012. Various reasons underlie the diverging trends of opinions in the individual groups.

Press Freedom Index (scale of 1-10)

	2012	2013	Change
General public	4.6	4.6	Has not changed
Journalists	4.8	4.3	Deteriorated
Media managers	5.4	6.2	Improved

The public's assessment is unchanged, but it appears that party preferences continue to exert the greatest effect on the evolution of public opinion.

The improvement in the perceptions of media managers may be attributable to fewer respondents sensing political pressure or political dependence, which would also make them view the state of press freedom more positively than in 2012. This assumption is also supported by a 19% decline in the ratio of those who believe that the financial stability of their workplace depends on the powers that be, and an 11% drop in the proportion of respondents who assess that the prevailing level of political pressure curtails press freedom. An interesting trend that emerges from the data is that while the responding journalists' place of residence had no effect on their individual assessments of press freedom, among media managers there were significant differences in the opinions of rural and metropolitan respondents. Media managers in Budapest gave the level of media freedom an average rating of 4.7, while their rural counterparts rated it a 6.2.

Our assumption is that the negative trend in journalists' assessment' may stem from both presumptions about and experiences of political and economic pressures. Though the change was not substantial, on the whole journalists perceived a greater dependence of the media on politics and business in 2013. It emerges from the data that perceptions of the state of press

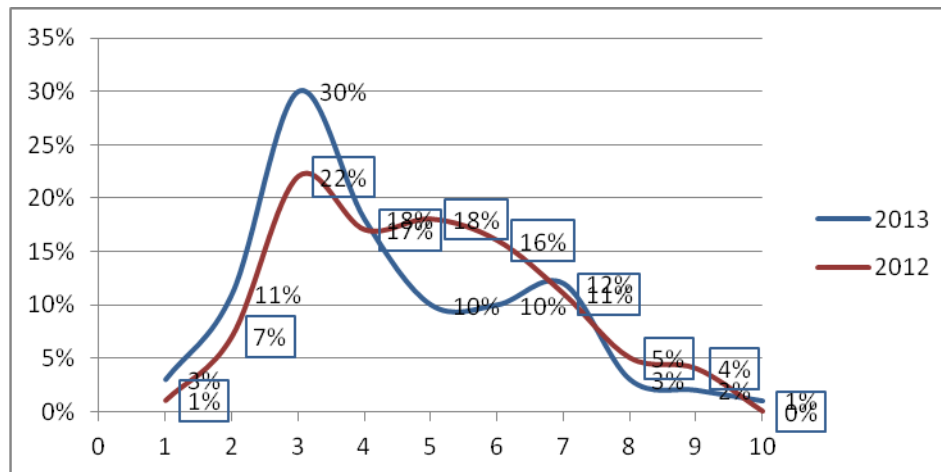
freedom and of political/business pressure on the media are closely intertwined. Those who sense a significant degree of political or business pressure gave press freedom a below average rating, while those who considered such pressures rather weak had a more positive outlook on the same. At the same time it is apparent from the data that journalists perceived a deterioration in the situation of the media on several grounds, and there was also a rise in the ratio of journalists who had engaged in self-censorship.

We did not find a clear answer to the question why the respective assessments of managers and journalists diverge in the context of pressure on the media, and why as a result they perceive the state of press freedom differently.

1.1. Journalists

According to journalists the state of press freedom has deteriorated, though not by a significant margin. This change appears more substantial if we consider the distribution of the particular index, however. There is a major leap at the value of 3: While in 2012 22% of responding journalists gave the freedom of press a score of 3, in 2013 this proportion had climbed to 30%. At the same time, average or slightly above average ratings declined substantially among respondents, from 18% to 10% and 16% to 10%, respectively. There was thus a rise in the proportion of those who consider the state of press freedom as more bad than good. The ratio of those who think of it as leaning more towards bad has grown, while there has been a decline in the proportion of respondents who gave it a positive assessment.

Distributions of journalists' press freedom index numbers



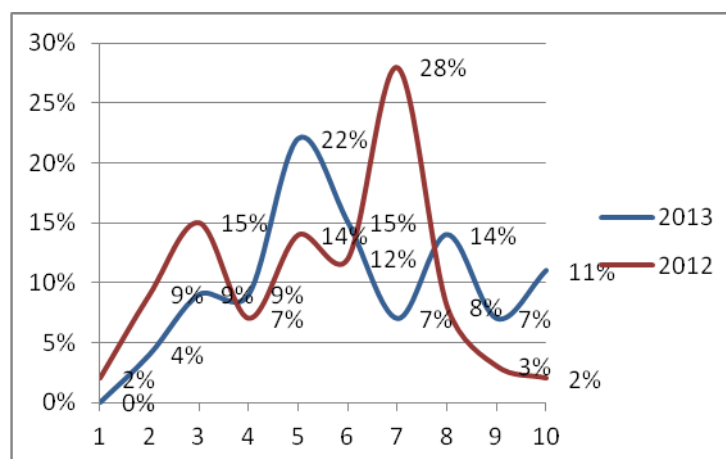
The two largest subgroups within the sample of journalists - those working in the online and the print press - both submitted average values of 4.3. Journalists working in commercial television offered a slightly more upbeat assessment with a mean value of 4.9. The representatives of other subgroups, such as for example journalists working in public television and radio, are too few to allow for a comparison of their opinions to those of other subsets.

Responding journalists' impressions of the scale of political and business pressure on the media play a crucial role in individual assessments of press freedom. The greater the perceived pressure, the worse individual journalists see the state of press freedom. Consequently, those who sense significant political pressure only gave press freedom an average score of 3.7, while those who observe substantial economic pressure rated it 3.6 in 2013. Those who assessed that the financial stability of their workplace excessively hinges on the support of those in power submitted an average value of 3.7.

1.2. Media managers

According to media managers, the state of press freedom in 2013 is close to being good, since they gave it an average value of 6.1 on a scale of 1 to 10. Their view is that press freedom has ameliorated over the past year, albeit only slightly, by 0.8 points. Managers' opinions are heavily polarised; the past year saw a significant drop - from 33% to 22% - in the proportion of those who gave press freedom a worse than average score, while at the same time the ratio of those who give it a very high score (between 8-10 points) rose significantly from 13% to 32%.

Distributions of media managers' press freedom index numbers



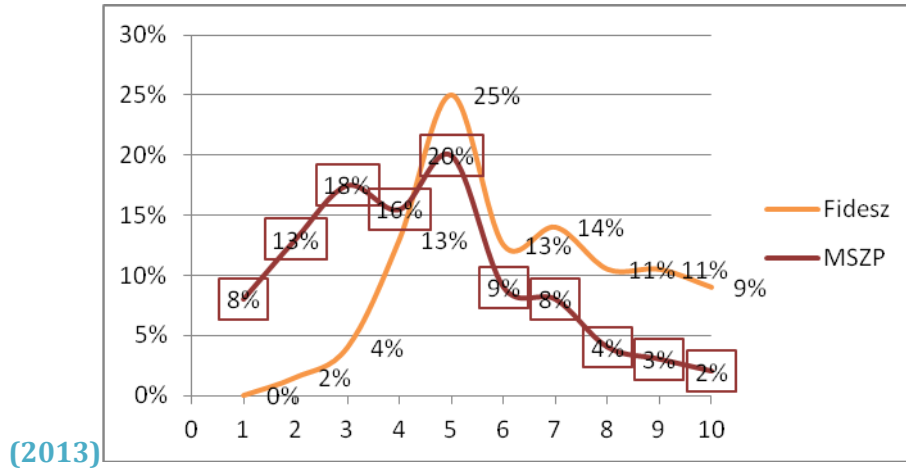
1.3. General public

The general public's assessment is unchanged since 2012: with 4.6 points, respondents gave the state of press freedom a score slightly below the middle value. In this group, the evaluation of press freedom was substantially influenced by two factors. One is respondents' opinion about the intertwinement between politics and media, and the other is party preference. Neither place of residence, age nor educational attainment correlate closely with respondents' assessment of the state of press freedom.

There are also significant differences in terms of how opinions developed, which stem from individual assessments of changes in the levels of intertwinement between media and politics. Those who think the situation has deteriorated and there is greater political influence gave press freedom an average score of 3.4, so they take a more dire view of trends in this area. Those who felt that there has been an improvement - i.e. a decline - in the intertwinement of politics and

media submitted an 6.8 on average; this group perceives the state of press freedom to be significantly better.

The distribution of popular views about press freedom by party preferences



The graph above shows the distribution of opinions on press freedom among supporters of the governing parties and the largest opposition party. There are substantial differences between the opinions of the two groups, since 19% of Fidesz supporters gave press freedom a score under 5, while 55% of MSZP voters shared this low assessment. The gap in perception is also reflected in the divergent mean values, which is 6.1 among Fidesz supporters and only 4.3 among MSZP voters. Stability prevailed not only in the overall social assessment of press freedom but also in the two camps' respective views, since the ratios were the same in 2012, when Fidesz voters gave average values of 6 and MSZP voters 4.3.

2. FACTORS INFLUENCING WHETHER PRESS FREEDOM PREVAILS

In the following we examined factors that influence perceptions of press freedom, and how strongly each of them impacts the overall assessment. What we thus sought to ascertain is how important these individual considerations were for media managers and journalists; which were most decisive in influencing their views; and which had the least impact. We employed a weighted index in the analysis to provide a numerical representation of how opinions evolved.

In your view, which of the following is necessary for press freedom? (not at all important=-100 points, not important=-50 points, important=+50 points, very important=+100 points)

Journalists			Media managers		
2012 balance	2013 balance	change	2012 balance	2013 balance	Change

the distribution of state advertising funds and subsidies in the media market is transparent	*	83 points	*		80 points	
the media authority is not exclusively made up of the candidates of political parties	83 points	79 points	-4	75 points	60 points	-15
public figures may be freely criticised without the threat of legal consequences	*	78 points	*		68 points	
only independent courts - and no other bodies - exercise control over print and online press products	80 points	77 points	-3	51 points	43 points	-8
there is no intertwining between media owners and political parties	82 points	72 points	-10	67 points	73 points	+6
the work of an editorial office is regulated by a code of ethics, which also regulates the relationship between owners, management and the editorial office	73 points	69 points	-4	66 points	58 points	-8
journalists are represented by strong professional organisations	47 points	67 points	+20	60 points	46 points	-14
self-regulation play a substantial role in media regulations	56 points	60 points	+4	62 points	40 points	-22
there is public service broadcasting financed with public funds	28 points	39 points	+11	42 points	38 points	-4
journalists have real say in the selection of editors-in-chief	26 points	36 points	+10	19 points	8 points	-11
media products tend to be owned by Hungarians	-48 points	-47 points	+1	-3 points	9 points	+12

2.1. Journalists

Though there was no significant change in the ranking of factors that influence press freedom, we nevertheless observe that opinions have changed somewhat. The relationship between politics and the media was considered to have lost some of its importance, though the decline was not substantial, while professional independence in turn has appreciated.

Two new factors were introduced among the questions. The criterion of transparent distribution of state advertising spending and subsidies immediately took the first spot among the conditions necessary for realising a free press. Another new aspect, the freedom to criticise public figures, was also considered rather fundamental by journalists, as it immediately jumped into third place.

The data continue to show that the independence of the press from politics is the most crucial element of press freedom. The top four spots on the list are criteria meant to safeguard the independence of the press, which also includes the right to freely criticise public figures in business and politics.

We observed a change of sorts in the relationship between media and politics, which may be explained by the phenomenon of soft censorship. The fact that direct intertwining between media and political parties has lost 10 points in terms of importance, while the transparent disbursement of state advertising has come to occupy the top spot, allows us to conclude that journalists sense the impact of soft-censorship.

It appears that as compared to 2012, journalists give greater weight to professional independence. The importance of journalism organisations has namely grown by 20 points as compared to the level measured in 2012. Similarly, the notion that journalist ought to have a say in the selection of their editor-in-chief has also gained 10 points in significance. The role of self-regulation has appreciated as well, albeit only slightly. At the same time the role of the ethics code - also a factor in professional independence - has lost some of its importance, though only to a rather negligible degree. It seems plausible that journalists react to the external environment and its influence by espousing the belief that they can only rely on their own professional integrity, which could explain the surge in the importance of professional independence.

2.2 Media managers

Managers assess that political independence continues to play the greatest role in terms of determining the level of press freedom. Though they consider all the listed criteria important in terms of their impact on press freedom - after all the average values they submitted were positive in all cases - it still emerges from the data that they accorded the majority of criteria less significance than in 2012.

Self-regulation experienced the greatest drop in terms of importance among the factors considered essential for maintaining a free press. Though they gave lower scores to a variety of

factors, managers accorded greater weight than previously to domestic ownership of Hungarian media products. We would venture to suggest that media managers appear to have adapted to the media policy environment, and that their changing views stem from bringing their own expectations in line with this environment.

2.3. Comparing opinions

Journalists and media managers, who have an up-close knowledge of how the media operates, continue to consider political independence as the factor with the greatest impact on press freedom. Opinions as to the importance of professional independence diverge, however. While journalists consider the issue increasingly important, media managers' opinions tend to go in the opposite direction, as they believe such considerations to be less important than in 2012. This growing gap between the two groups' views may stem from differences in the way their respective professions work. It may be that journalists believe to have no other recourse to protect themselves from the external environment - and especially politics - but by safeguarding and reinforcing professional independence. For media managers, in contrast, the professional independence of journalists is not that important; they may even regard it as a factor that interferes with business operations. An interesting development is that in addition to political independence, media managers also accord growing weight to media outlets being owned by Hungarians.

3. ASSESSMENTS OF THE WAY THE MEDIA OPERATES

In the following we sought an answer to the question of how these three groups assess the overall workings of the media as compared to the previous year. To this end, we formulated some basic statements that define the state of the media and illustrate how it works. In 2012 the point of reference was the new media regulation, that is we asked how and to what degree respondents had experienced changes in terms of the factors we listed since the new regulatory framework was put in place. Since the previous year lacked any such defining novelties or changes, we did not designate a distinct point of reference but simply inquired whether the groups examined had perceived any changes over time. We asked managers and journalists the same questions, but gave the general public fewer, for we assumed that some of the things we asked the first two sets of respondents were too technical for the average citizen. We use a weighted index so that we can provide a numerical presentation of how opinions have developed.

How has it changed? (deteriorated=-100 points, has not changed =0 points, improved=+100 points)

Journalists			Media managers		
2012	2013	Change	2012	2013	Change

intertwinements between media enterprises and political parties	-60 points	-83 points	-23	-40 points	-39 points	+1pont
social standing of journalistic work	-59 points	-81 points	-22	-49 points	-41 points	+8 points
quality of public media services	-69 points	-79 points	-10	-16 points	-4 points	+12 points
operating conditions of media enterprises	-65 points	-77 points	-12	-45 points	-39 points	+6 points
legal conditions of journalistic work	-67 points	-70 points	-3	-22 points	-17 points	+5 points
diversity of publicly disseminated opinions	-47 points	-65 points	-18	-15 points	+2 points	+17 points
reliable/predictable operation of the media authority	-50 points	-50 points	-	-24 points	+15 points	+39 points
quantity of contents that may be harmful children	8 points	-18 points	-26	+38 points	+7 points	-31 points

3.1. Journalists

All but one of the responding journalists felt that the situation has deteriorated since 2012 with regard to all the statements we listed. The negative shift in the assessment of the intertwinement between politics and media may reflect journalists' own opinions concerning the changes in the media markets. We nevertheless did not anticipate such a sharp drop (-22) in the perception of the societal standing of journalism. The underlying reason may be journalists' sense that there are increased political and economic pressures at work, as well as the role of the inscrutable system of state advertising. It is conceivable that as the sense of political pressure increases, journalists will also increasingly feel that the public's regard for their profession - and correspondingly the prestige thereof - declines.

3.2. Media managers

Media managers perceive that the general state of the media has somewhat improved in the past year. In response to some questions, they reported a slight improvement only, while concerning the rest the positive changes they observed were more substantial. Managers observed negative

changes only in the area of the quantity of content that may be harmful to minors. This change may have been brought about by the negative views of those working in tabloid media, for the average score they offered was negative, while those working in public media offered positive assessments in this regard.

The most positive change was observed in the predictable functioning of the media authority, whose evaluation appreciated by 39 points. We do not know why the authority is considered to be working so much better in 2013. It is conceivable that the authority has indeed performed better than previously, and that this finds a reflection in managers' opinions. It is also possible, however, that an improvement in this area is only perceived now because of prior negative expectations concerning the media authority, which ultimately failed to materialise. Managers may have anticipated worse and since that failed to happen, they see this is a positive trend.

3.3. General public

Though the public's assessment of press freedom has not changed, we can nevertheless observe that they uniformly perceive the media to be working better than in 2012. According to the public, the esteem of the profession of journalism and the quality of public media have improved. Despite the fact that journalists themselves take a decidedly grimmer view of their social standing than in 2012, the general public perceives an improvement in this area.

How has it changed? (deteriorated=-100 points, has not changed=0 points, improved=+100 points)

	2012	2013	Change
social standing and esteem of journalistic work	-24 points	-15 points	+9
quality of public media services	-14 points	-5 points	+9
quantity of content that may be harmful to children	-12 points	-5 points	+7
diversity of published opinions	-17 points	-15 points	+2
intertwinements between media enterprises and political parties	-26 points	-25 points	+1

3.4. Comparing opinions

The opinions of the three groups we examined - that is journalists, media managers and the general public - diverge significantly from one another, since journalists typically view the media's situation as worse than in 2012, while the general public and media managers observe a pronounced improvement therein. The difference could of course be explained by the fact that journalists have a more up-close view of how the media operates, and this proximity renders problems and anomalies more visible. The general public, in contrast, observes events from afar and lacks such detailed information. This difference certainly does not apply to media managers, however. In their case the change may stem from the polarisation of views, since - as the data reveals - certain media managers perceive a deterioration concerning all eight factors listed, while others see positive changes in all areas.

4. POLITICAL AND BUSINESS PRESSURE ON THE MEDIA

Political and business pressure, that is media independence, may be the most decisive area in terms of how press freedom has evolved. Professional opinions agree that business and political pressure exert the greatest impact on press freedom. Hence we had several questions on this topic, such as the degree of pressure, its direction, instruments and sources, or the personal experiences with pressure, for that matter. We did not undertake to provide an exact definition on what constitutes pressure - since that would be an impossible undertaking - but sought to ascertain instead how and what the three groups examined perceived of the pressure brought to bear on the media.

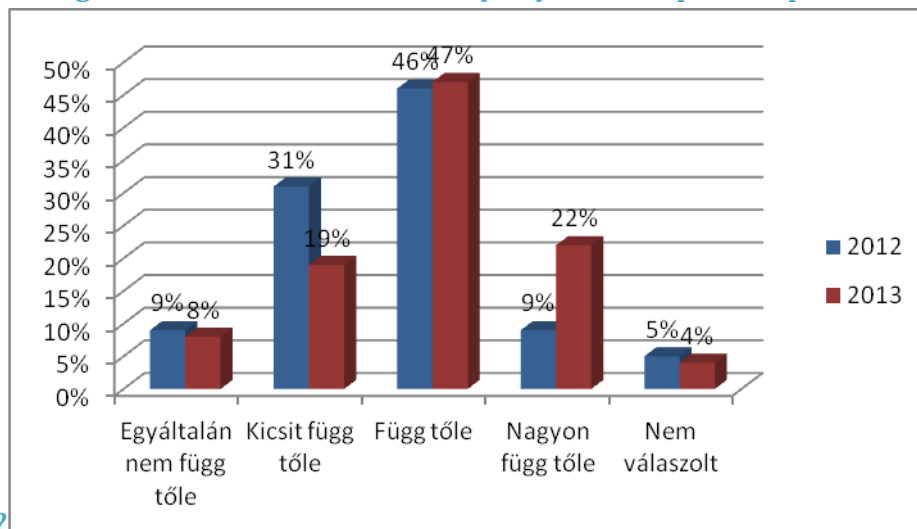
4.1. Journalists

On the whole we observe that journalists perceive an increasing pressure on the media by politics and business. Political influence still appears stronger, however, than economic influence. The data suggest that there is a duality of sorts at play here, for journalists assess that political influence still exceeds economic influence, but among the instruments of pressure the role of state advertisements continues to be the most significant. It may well be that it was the lack of transparency surrounding the distribution of state advertising spending that has led journalists to perceive a rise in the role of political influence; but they are also aware that this influence is exerted indirectly, by economic means.

The graph below shows that in 2013 the proportion of those who indicated that the financial stability of their workplace depends only to a slight degree on politics dropped by 12%, while the share of those who perceived a great degree of dependence increased by 13%. While in 2012 only 55% of responding journalists assessed that the financial stability of their workplace depended to some degree (slight and great degree of dependence taken together) on politics, this ratio rose to 69% by 2013. The influence of politics on the financial stability of media outlets has therefore increased according to journalists.

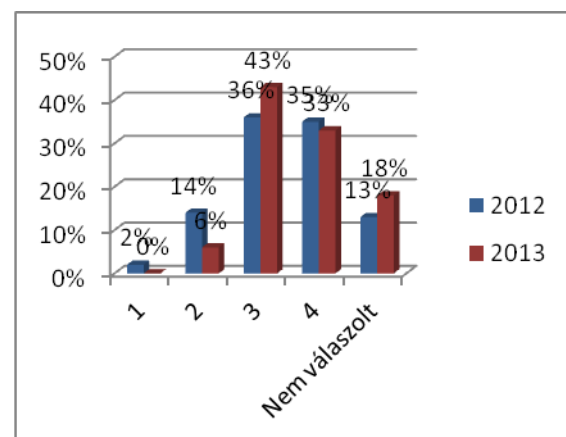
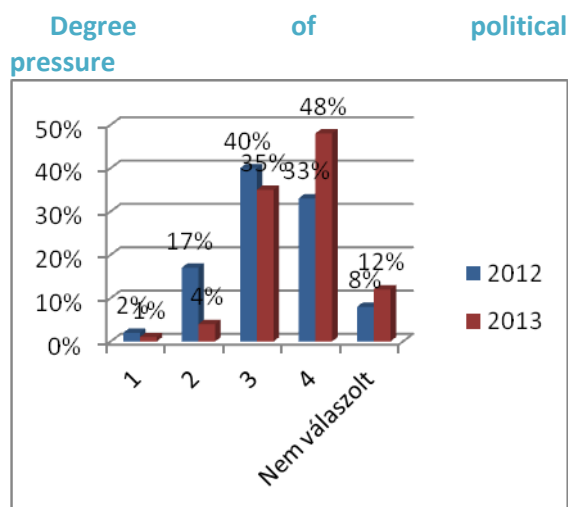
To what degree does the financial stability of your workplace depend on

politics?



In terms of their relative assessment of political and economic pressure, journalists viewed the nature of political pressure as worse. The ratio of those who felt that political pressure was strong enough to prevent the press from working freely rose by almost 15 percentage points, to 48% since 2012. Though journalists also perceive a surge in the level of economic pressure since 2012, the change is nevertheless not as pronounced as in the case of political pressure. A third of respondents consider that economic pressure is significant enough to threaten press freedom. It emerges clearly from the data that in 2013 journalists perceived a rise in both, the levels of political and economic pressure alike.

In your view, what degree of pressure is there on the media in Hungary?(A value of 1 implies there is no pressure; a value of 4 denotes a level of pressure that impairs the free work of the press)



What is interesting is that in 2013 the share of those who failed to respond grew in the context of both types of questions, those relating to political as well as those concerning economic pressure. This could simply mean that a growing proportion of respondents was unable to assess the level of prevailing pressure, but also that for some reason they do not want to respond to the question.

4.1.1. Instruments of pressure

The ranking of the instruments used to exert pressure has not changed in the past two years, a shift has only occurred in the significance attributed to them individually.

How substantial a role do each of the instruments below play in terms of pressuring the media? (Weighted index: no role at all in pressuring=-100 points, very substantial role=+100 points)

	2012	2013	Change
decisions about state advertising (deprive of/withdraw advertisements because of critical content, rewarding friends)	+44 points	+54 points	+10
indirect pressure on journalists by politicians through editors-in-chief and management	+28 points	+36 points	+8
the role of media authority decisions (fines, licences, frequency licences)	+21 points	+29 points	+8
advertisers' indirect influence through editors-in-chief and management	+26 points	+27 points	+1
decisions by private advertisers (deprive of/withdraw advertisements because of critical content, rewarding friends)	+9 points	+19 points	+10
politicians' direct pressure on journalists (phone calls, resorting to personal relations)	+4 points	+7 points	+3
private advertisers direct influence on journalists	-11 points	-4 points	+7

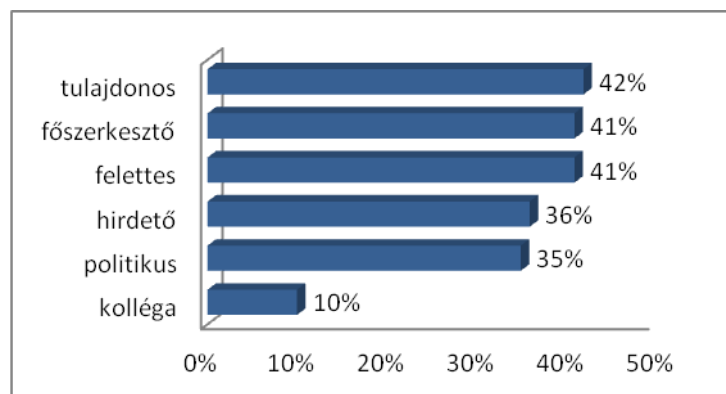
The role of economic instruments has become more important - if only by a hair's breadth - than that of political instruments. The fact that journalists perceive the role of pressure through decisions about state advertising spending as playing an increasing role points to the presence of soft censorship. The significance of financial instruments is also underlined by the change in the perception of pressure through private advertisers' spending decisions, which has increased by 10 points based on the weighted index, while the direct influence of advertisers has appreciated

by 7 points. Among the political instruments it was primarily the indirect influence of politicians, as well as the role of the media authority's decisions - or rather the possibility of such decisions being rendered - that have gained in importance.

4.1.2. Sources of pressure

Even though the pressure exerted on the media has grown, and in fact half of all respondents reported having been subject to political or economic influence, it is not really possible to identify a main source among the factors that seek to influence the work of journalists. In the table below we show to what degree each of the players listed below is considered a source of pressure on the media.

Please indicate who pressured you and to what degree (2013)



Three groups can be distinguished: owners, editors-in-chief and superiors. They are the most significant sources of pressure. Advertisers and politicians do not trail far behind. The list is closed by colleagues, who are least likely to be a source of pressure according to journalists.

Though these ratios change only slightly if we narrow our analysis to those who have actually personally experienced political pressure, the picture that emerges is nevertheless more nuanced. Editors-in-chiefs and owners make it into the top group, with 55%. Politicians and superiors are the source of 50% of instances of outside influence, while advertisers play a role in only 39%.

4.1.3. Personal experience

The proportion of those who have personally experienced political pressure continues to be around 50% of the entire sample group. And pressure once again tends to be directed at editors, but both groups have seen an increase in the number of those who have personally been subject to pressure.

During the past year, have you personally been subject to pressure in the course of your journalistic work?

	2012	2013
Among editors	63%	67%
Among journalists	51%	60%

Journalists working in the print press were subject to the most significant pervasiveness of political pressure, with 73% encountering it personally. Considerably fewer online journalists had such experience, however, as "only" 47% indicated that they have been subject to political pressure in the course of their work.

We inquired not only about personal experiences but also about the objectives that the pressure sought to realise. Most frequently, political pressure sought to conceal issues (47%). Least frequently - among the possibilities mentioned here - was it intended to ensure that names, products and companies not be mentioned.

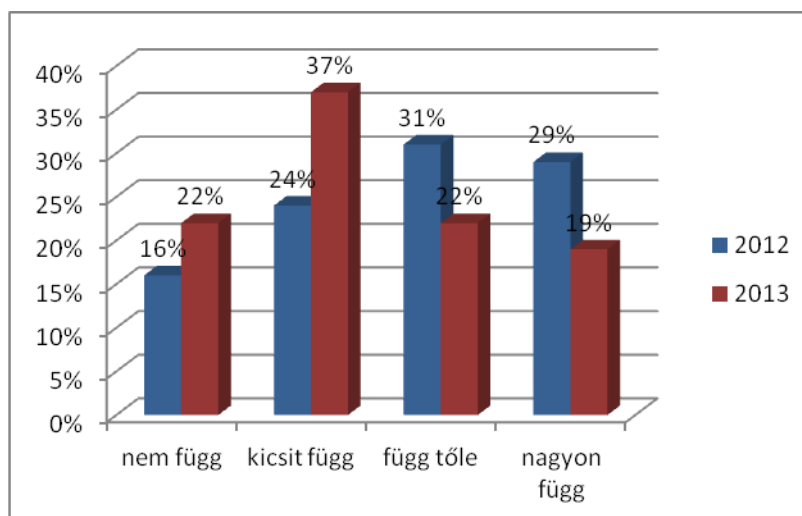
Drawing on the lessons of the 2012 data collection we inquired about personal experiences not only in the context of political pressure but also with regard to economic pressure. Fifty percent of the entire sample had personally experienced economic pressure in the course of their work. Among editors, this ratio reached 72%, and among journalists it was "only" 52%.

Based on the answers provided, the source of economic pressure tends to vary considerably. For one, it is directed at influencing content, for example by avoiding issues that are deemed harmful to the interests of owners/advertisers, by publishing surreptitious advertising and by presenting the advertiser in a favourable light. It is also asserted through threats and the prospect of withdrawing advertising commissions. Journalists are also subject to economic pressure in the form of direct existential threats, such as the loss of their job or forgoing pay raises.

4.2. Media managers

In managers' opinion there has been an improvement in terms of the financial dependence of their workplace on politics. While in 2012 60% of managers perceived such a dependence (total responses in the categories "some degree of dependence" and "substantial degree of dependence"), by 2013 the proportion of respondents indicating this had dropped to 51%. And the share of those who perceived a substantial dependence had declined by 10%.

In how far does the financial stability of your workplace depend on politics?



Along with their improved perception of press freedom, managers also sense a decline in the prevailing levels of political and economic pressure. It is readily apparent that with regard to political pressure, both the mentions of strong and strongest pressure have dropped since 2012, that is fewer media managers perceive political pressure. As far as economic pressure is concerned, the ratio of those who observed very strong pressure has also declined.

	Degree of political pressure		Degree of economic pressure	
	2012	2013	2012	2013
No pressure	6%	20%	4%	9%
2	15%	20%	12%	24%
3	43%	35%	44%	42%
Greatest pressure	37%	26%	40%	24%

4.2.1. Instruments of pressure

Managers assessed that the role of all individual instruments of pressure has declined, the underlying reason for which was presumably the perception that pressure on the whole has diminished. The greatest impact was exerted indirectly by advertisers through editors-in-chiefs and the management, and by indirect pressure brought to bear by politicians. Interestingly, managers felt that of all things, the role of instruments of economic pressure (decisions by state and private advertisers) declined the most in terms of impact.

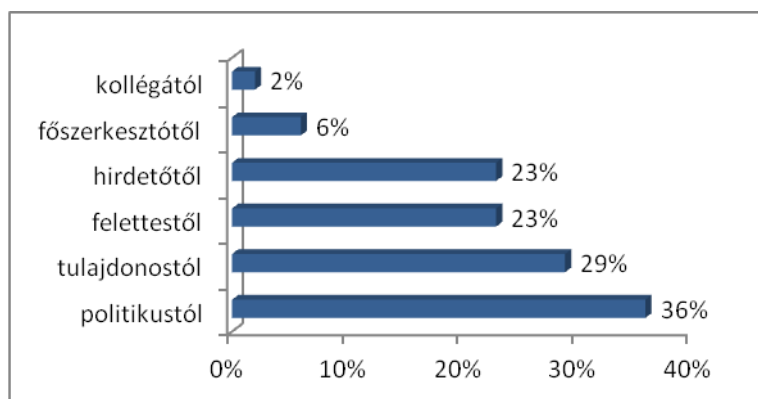
How significant is the role of the instruments listed below in terms of pressuring the media? (weighted index: no role in pressuring = -100 points, a substantial role = +100 points)

	2012	2013
decisions about state advertising (deprive of/withdraw advertisements because of critical content, rewarding friends)	+52 points	-10 points
decisions by private advertisers (deprive of/withdraw advertisements because of critical content, rewarding friends)	+10 points	-33 points
indirect pressure by politicians through editors-in-chief and management	+39 points	+9 points
politicians' direct pressure on journalists (phone calls, resorting to personal relations)	+5 points	-24 points
private advertisers' direct influence on journalists	-13 points	-33 points
the role of various media authority decisions (fines, licences, frequency licences)	+22 points	+2 points
advertisers' indirect influence through editors-in-chief and management	+26 points	+10 points

4.2.2. Sources of pressure

Just as in the case of journalists, we can once again distinguish between three groups. The first and least important sources of pressure are colleagues and editors-in-chiefs. This is obviously explained by the roles and functions of managers in media enterprises. The second group, which does play a role in exerting pressure - albeit a rather minor one - consists of advertisers and superiors. But pressure most often derives from owners and politicians.

Please rate the following indicating who has been a source of pressure and what level of pressure they exercised (2013)



The above allow us to conclude that managers might perceive the role of advertising decisions by state and private advertisers diminished as an instrument of pressure, while they consider the indirect influence of politicians as the most substantial, because the most frequent sources of pressure are politics and owners.

4.3. General public

The public's perception is that there has been no substantial change in the degree of political pressure, the ratios were similar in both years.

Degree of pressure coming from political parties

(A value of 1 implies there is no pressure; a value of 4 denotes a level of pressure that impairs the free work of the press)

	2012	2013
1	3%	5%
2	9%	10%
3	33%	36%
4	44%	41%
Don't know	10%	7%

Just as in the case of the press freedom index, the most potent factor in terms of determining opinions on this issue was party preference. Only 20% of Fidesz voters perceived that political pressure on the media was very substantial in 2013, while among MSZP voters this proportion was 61%, and in the general public it stood at 41%. It is obvious, therefore, that those with a critical view of the political influence on the media tend to be underrepresented among Fidesz voters, while they are overrepresented in MSZP's camp.

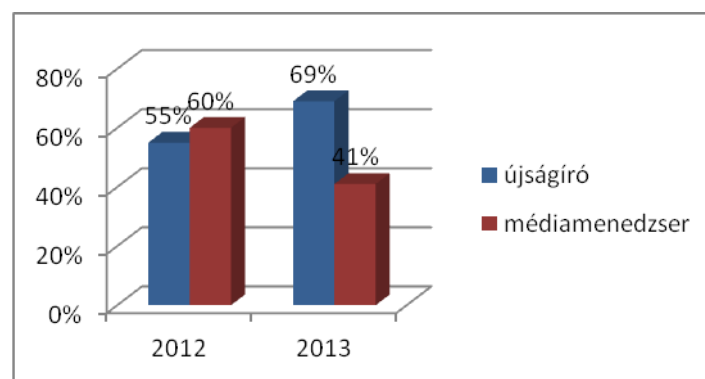
4.4. Comparing opinions

Managers and journalists differ in terms of their assessment of political/economic pressure. Journalists perceive stronger pressure, while managers do not view it as weighing heavily. This

difference of opinions is also connected to the trend observed in the press freedom index. Managers have a more favourable assessment of the state of press freedom, and at the same time they also consider the impact of political and economic pressure to be weaker. Journalists, in the meanwhile, experience more pressure and also have a more dire view of the state of press freedom.

The two groups' opinions differ not only in terms of how they view the potency of pressure, but also in connection with their sense of how the situation has evolved over the past year. Media managers see declining pressures in both contexts, while journalists consider that both economic and political pressure have grown, though the influence of the latter as more substantial.

Proportion of respondents who believe the financial stability of their workplace depends on politics



There are also significant differences between the two groups in terms of their respective views as to the dependence of their workplace on politics. For one, nearly two-thirds of journalists consider that their workplace depends on politics, while fewer than half the managers share this perception. Moreover, the groups' opinions have moved in opposite direction over the past year; while managers' view of this particular issue has improved, that of journalists has deteriorated.

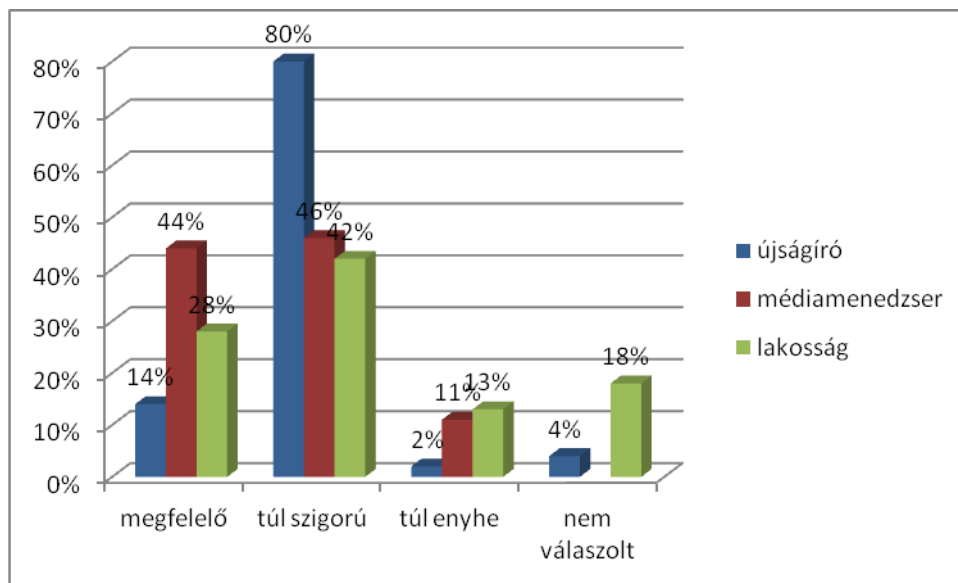
An interesting piece of data is that the population - who ordinarily have no immediate information about the scope of political influence and can therefore only make assumptions about this - have a more negative assessment than managers. While 46% of the general public believes that there is significant political pressure brought to bear on the media, for managers this ratio stands at only 26%.

5. MEDIA REGULATIONS

In 2012 we were primarily interested in opinions about the new media regulations and their impact on journalism. An investigation of the regulatory system no longer made sense in 2013, however, since no change had occurred in the pertinent regulations, and hence we left out several questions we had put forth in the previous questionnaire. Since our view is that the

media's operations and the development of press freedom are fundamentally influenced by the regulatory environment, we sought to gauge the opinions of journalists, media managers and the public on how deep regulations in the area of media must go. Our question was therefore directed at finding out whether the current regulations are appropriate or whether we need a stricter or more lenient legal regime in this area.

What is your opinion of the current media regulations? (2013)



5.1. Journalists

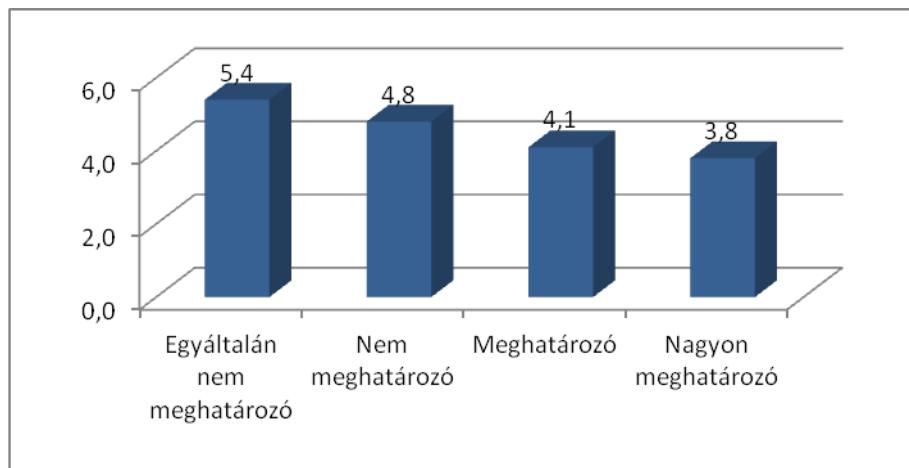
More than three-quarters of responding journalists opined that the current media regulation framework is not appropriate. Their assessment is that the media are overregulated and that fewer regulations should exist than is presently the case. There is a strong link between journalists' assessments of media regulation and press freedom, since those who opined that the existing media regulations provide an adequate framework for the media's operations gave press freedom a relatively high score of 5.9, while those who consider that fewer prohibitions and requirements would be desirable share a considerably worse outlook on the state of press freedom (4.1).

Despite the marked opinions reviewed above, it is surprising that slightly over half of responding journalists (53%) hold that the media regulations impact what they do professionally, while only 30% assess that the regulations do not play a role in their work. The impact of the media regulations on the work of journalists appears rather stable, since the ratios have not changed since 2012, when 34% of the sample indicated that the media regulations did not influence their work, while 48% said that they played a decisive role in shaping it.

Though it seems as if there is no close connection between journalistic work and the media regulations, if we take a closer look behind the data we observe that there is a connection

between journalists' impressions of the regulations' impact on their work and their assessment of the state of press freedom

How influential are the current media regulations in your work? - How do you assess the state of press freedom right now? (2013)



Respondents' views of press freedom are inversely proportional to their perception of how substantially media regulations impact their work. Those who do not think that the regulations play a decisive role gave press freedom a slightly above average score, while those who felt that the regulations substantially affect their work tended to perceive the state of press freedom as problematic.

5.2. Media managers

A plurality of managers (46%) believes that the current media regulations are too strict, but those who assess that they are just right (44%) do not lag far behind. It appears that perceptions of the severity of the prevailing regulations correlate with general impressions about press freedom; managers who consider the regulatory framework to be just about right gave press freedom an above average value of 7 (the mean was 6.2), while those who found the laws too strict only gave it a 5.2.

5.3. General public

Though the general public's opinion on the media regulations is considerably more polarised than that of journalists, a plurality (42%) nevertheless held that fewer regulations are needed. The evaluation of the answers is made problematic by the fact that 35% of respondents in this category indicated not being informed about media regulations, and only 8% called themselves well-informed.

Party preferences explain a significant portion of disagreements within the sample population. Fidesz supporters are overrepresented among those who believe the regulations are adequate, while MSZP voters tend to be overrepresented among those who think fewer prohibitions and requirements would be better.

What type of media regulations are necessary? (2013)

	Fidesz	MSZP
The current prohibitions and requirements are neither too severe nor too soft, they provide an adequate framework for the operations of the media	42%	20%
We need fewer legal prohibitions and requirements than we currently have.	29%	61%
We need more legal prohibitions and requirements than we currently have	15%	10%

The public's opinion is therefore not so much based on professional considerations but on political views and is related to its overall perception of press freedom. Those who think the media regulations are adequate gave press freedom a slightly above average score (5.6), while those who think fewer regulations would be preferable gave it a substantially below average score of 4.3.

5.4. Comparing opinions

Journalists and media managers view media regulations very differently. While 46% of managers consider the regulations too severe – that is they believe that fewer prohibitions and requirements are needed – a whopping 80% of journalists share this assessment. Among those who think the regulatory framework is adequate, there is an over threefold difference between the two groups: three times as many managers as journalists consider the regulations to be adequate. What the two groups agree on, however, is that those managers and journalists who think of the regulations as too strict also take a dimmer view of the state of press freedom. This also applies to the general public; those who find the existing regulations too severe tend to be less satisfied with the prevailing levels of press freedom than the rest. Popular views are substantially influenced by party preferences, however.

6. MEDIA PLURALISM

Our objective was not to find out what respondents think about specific contents that appear in the media, but instead sought to ascertain if there are any issues that the Hungarian media conceal. That is why we asked respondents in all three groups whether there are any issues concealed by the Hungarian media, or whether all issues are given their due weight in terms of media coverage.

None of the groups' answers has changed significantly as compared to the previous year. A substantial majority of journalists and managers continue to believe that there are concealed phenomena. What is interesting, however, is that journalists are less likely to have such a negative view of media content, and that a fifth of respondents failed to answer this question.

In your assessment, do the media cover all issues commensurately with their importance?

	Journalists		Managers		General public	
	2012	2013	2012	2013	2012	2013
No, certain issues are being concealed.	77%	75%	96%	97%	80%	75%
Yes, the majority of the media provides adequate coverage in this respect.	6%	5%	4%	3%	13%	17%
No answer	17%	20%	-	-	7%	8%

The opinion of the general public has not changed substantially. There has been a slight drop in the share of those who believe there are some concealed phenomena, and there has been a proportional decline in the ratio of those who believe that each issue receives its due weight in terms of media coverage. Party preferences once again have a substantial impact on popular opinions: 56% of Fidesz voters believe there are concealed phenomena, but among MSZP supporters this ratio rises to 83%.

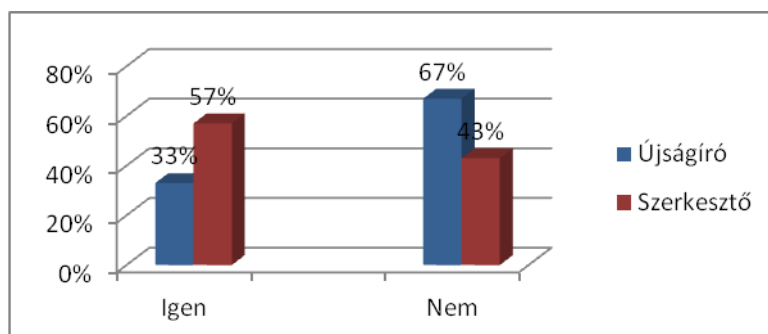
7. THE PROFESSION OF JOURNALISM

We also found it important to ask journalists not only about their views of the media in general, but also about journalism as a profession. We sought to find out how they perceive their own vocation.

7.1. Self-censorship

While in 2012 "only" 22% of respondents indicated that they had concealed or distorted political and economic facts in the interest of avoiding some unfavourable consequences, this ratio rose to 34% in 2013. There is a substantial connection between the assessment of press freedom and the application of self-censorship; those namely who have resorted to self-censorship gave the state of press freedom a score of 3.7, while those who did not gave it a 4.8.

Has it ever happened in your journalistic practice that you concealed/distorted some political/economic facts to avoid unfavourable consequences? (2013)



It is interesting that editors are almost twice as likely to resort to self-censorship than journalists. It is, however, congruent with the disclosed instruments of political and economic pressure, since messages seeking to influence the media are not directly conveyed to journalists but to editors instead.

It appears that self-censorship is most prevalent in the print press. Fifty-three percent of journalists working for print publications have concealed facts to avoid unfavourable consequences. With 27%, the online press has the lowest ratio of journalists who have resorted to self-censorship.

7.2. Sense of vocation, love of vocation

The responding journalists' views on ethical and professional issues appear decidedly uniform. Significant differences in opinion appear only in terms of whether media owners' corruption affairs ought to be revealed.

Does a person act properly if

	Yes	No
as a journalist he/she refuses to name the source from whom he/she received information when questioned by the prosecutor's office?	92%	8%
as an editor-in-chief he/she ensures that his/her newspaper reports on corruption scandals that the owner is involved in, even though his/her job description includes a proviso to be loyal to the employer?	83%	17%
as a journalist he/she owns an enterprise that operates the website of a politician?	9%	90%
as a journalist, he/she promises a source that the latter will be presented in a favourable light in relevant reporting in exchange for valuable information?	7%	93%

We have received many different responses to the question of what people like about the profession of journalism. The variety of considerations mentioned can be grouped around two keywords, however. One is independence and the other is opinion formation. In this context independence does not imply professional independence – i.e. the free performance of one's work without external pressure or influences – but the way the work is organised and carried out, its flexible, varied and interesting performance. By opinion formation journalists meant collecting information, searching for the truth, as well as specifically writing, and of course the impact they had through writing.

Would you be glad if your child chose to become a journalist?

		What is your assessment of the state of press freedom?
Yes	43%	4.6
No	57%	4.1

Slightly more than half of responding journalists (57%) would not be pleased if their children chose the same profession. This preference is not determined by the type of media the respondent works in, nor by the position he/she occupies. A significant 63% of those who have personally resorted to self-censorship, and 60% of those who have experienced pressure, would prefer if their children did not pursue a career in journalism. The negative experiences are also connected to opinions about press freedom: those who would be pleased if their children became journalists have a better impression of press freedom than those who answered negatively.