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THE STATE OF PRESS FREEDOM 2014



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This analysis was written by
Szonja Navratil

THE STATE OF PRESS FREEDOM IN 2014



MÉRTÉK MEDIA MONITOR

Editorial Board

Attila Mong, Krisztina Nagy
Gábor Polyák, Ágnes Urbán
Erik Uszkiewicz

**If you have any questions,
do not hesitate to contact us:**
info@mertek.eu
www.mertek.eu

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Ágnes Urbán, managing director

Responsible editor

Gábor Polyák



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**For further information
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MÉRTÉK MEDIA MONITOR
1042 Budapest, Árpád út 90-92., Hungary
<http://mertek.eu> • info@mertek.eu

ABOUT THE ANALYSIS

Research objective

Mérték Media Monitor first compiled a Press Freedom Index (PFI) in 2012. The comprehensive PFI is made up of the results collected from three parallel research projects. We surveyed three groups: journalists, media managers (a group comprising media owners, executives of media companies and the management of media enterprises) and, using a representative national sample, the general public. Though the public sample was representative, the samples of journalists and media managers were not. What we sought to find out was how these three groups think about the state of press freedom in Hungary, about the way the domestic media work, and about the level and nature of political and business pressure on the press. We also asked questions about the role of journalism in society and the problem of self-censorship. We repeated our research in 2014 for all three previously surveyed groups, and in the following we will present a comparative review of the data collected over the past three years. The detailed analysis of the research on media managers was performed by the Publicus Institute.¹ The conclusions of our analysis on media managers are based on the Publicus Institute's study.

Methodology

In conducting our research, we strove to obtain a comprehensive picture of whether and how press freedom prevails and how the media in Hungary operate. The questions we asked journalists and media managers were of a professional nature, while the questions we put to the general public did not require any special expertise or journalistic experience, which is why the survey of this group featured the fewest questions.

The questionnaire drawn up to survey the general public was administered to a representative sample of the population, but the journalists and media managers who responded were not a representative sample of their respective groups. Journalists' responses were gathered by Mérték Media Monitor, the study on media managers was compiled by the Publicus Institute, while the survey of the general public was performed by Medián Közvélemény-és Piackutató Intézet (Median Public Opinion and Market Research Institute). The national survey was conducted in October 2014, based on a 1,200 person represent-

¹ The Analysis will be published on Mertek's website (<http://mertek.eu>).

ative sample. Media managers were interviewed in November 2014, with 51 managers responding to our questions.

We sent our questionnaire to a wide range of journalists in the print and online press, in radio and television, as well as public service media. We also strove to ensure that both left and right-wing media be represented in our sample. Generally, we sought to cover outlets that provide serious news, which is why tabloid media were not included in the sample. Respondents filled out the questionnaires anonymously, and hence we do not know for certain where respondents work and what the response rate was at each media organisation contacted. The online questionnaire was filled out by 170 journalists. The majority (55%) of the sample comprising media workers were journalists, 40% were editors, 3% were managers, 1% were owners and 1% were in sales. Almost three-fourths (82%) of all respondents were Budapest residents, 8% live in county seats and 8% in other regional towns. The overwhelming majority (90%) of respondents has a higher education degree from a college or university. The majority of responding journalists (53%) are employed by online media, 26% work for print outlets, 6% for commercial television channels, 3% for public service radio, 6% for commercial radios and 2% for public service television.

We used a weighted index in our analysis to express in numerical terms how opinions changed over time. The weighted index was created by giving the following scores to respondents' evaluations of certain factors whose importance we sought to assess: -100 points if it was not important at all, -50 points if it was not important, +50 points if it was important and +100 points if it was very important. Where we sought to track change over time, deterioration was -100 points, unchanged was 0 points and improvement was marked as +100.

Our analysis is broken down into several issues, each chapter reviews one of these issues and for each chapter we have a separate discussion of the responses and changes of each subgroup. At the end of each chapter we compare the opinions of all three surveyed groups.

Please send your observations, opinions and questions concerning the study to Szonja Navratil at navratil.szonja@mertek.eu, or, alternatively, you may also share these on Mérték's website or Facebook page.

THE MOST IMPORTANT OBSERVATIONS

Of the three groups, media managers have the most positive view of press freedom in Hungary. The general public regards the state of press freedom as neither good nor bad, while journalists tend to view the prevailing situation as bad.

For all three groups, respondents' assessment of how independently the media operates from politics is the most decisive factor in terms of shaping their view of the general state of press freedom. Those who assess that there is significant political and business pressure on the media have a dimmer than average view of press freedom. Those, in contrast, who perceive lower levels of political and business pressure tend to have a more positive view than the average of the prevailing level of press freedom, and this holds for all three groups. The views of the general public are also coloured by party preferences.

General public

Since over the past three years there was no significant change in the opinions expressed by the general public, there is also no clearly discernible trend in how these evolve.

Audiences have a slightly improved view of press freedom as compared to 2013. This change is not substantial, however, as their average score of press freedom rose from 4.6 to 4.9. The views of the general

public are slightly paradoxical, for even though their overall assessment of press freedom has improved, their specific answers concerning how the media work manifest a downward trend.

The general public has an ambiguous picture of how press freedom has fared in Hungary – though 83% assess that there is political pressure on the media, on the whole they nevertheless view the state of press freedom as improved over 2013.

In terms of political and economic pressure, there has been little change in popular preferences as compared to the samples of journalists and media managers. However, party preferences, which tend to significantly correlate with respondents' views on a variety of press freedom-related issues, are less decisive when it comes to this particular question. In the general population the ratio of those who believe that the media conceal certain phenomena has declined by 9% as compared to 2012 levels.

Journalists

The changes in the views of journalists can be seen as a trend now, for their assessment of press freedom is continuously deteriorating. The driving force behind this negative trend is the growing share of those who believe that political pressure on the media is on the rise. Over the past three years the share of those who believe that the financial stability of their workplace depends to a significant extent on politics has risen from 9% to 29%, while the ratio of those who assess that political pressure has reached proportions that impede press freedom has grown from 33% to 52%.

Journalists believe that the two most important elements underlying the effectuation of press freedom in 2014 were free advertising markets and, closely connected to the latter, the transparency of state advertising spending as well as the right to freely criticise public figures. While in the previous two years the fact that the Media Council is exclusively made up of political delegates was seen as one of the top two problems, by 2014 the political dependence of the increasingly less relevant Media Council dropped to the fifth spot among the elements of press freedom. The fact that a mere 8% of responding journalists viewed the Media Council as an institution that helps press freedom prevail is an indication of the particularly Hungarian problems of press and media freedom.

Media managers

Media managers' assessment of press freedom has improved by almost a whole point between 2012 and 2013, and then deteriorated slightly by the time of the 2014 survey. Media managers are the only group among the three interviewed whose assessment of the state of press freedom was leaning towards a positive view overall.

In the case of managers, perceptions of political pressure are closely intertwined with the overall impression of press freedom. The differences in the three groups' assessment of press freedom thus stem from the fact that as compared to respondents in the other groups, a smaller proportion of media managers perceives political or economic pressure. This perception is clearly influenced by the size and composition of the sample: Few media managers were willing to respond to our questions, and in particular managers working for media with more critical views were more likely to decline answering our questions.

Though it might be an exaggeration to say that the opinions of managers and journalists are antithetical, they certainly evince significant differences. Both in terms of press freedom and their sense of the ongoing changes, journalists tend to view the state of domestic media as worse, while managers tend to assess these more positively. Media managers' view of press freedom is heavily polarised. In addition to polarisation, however, there is also a trend in the way their opinions evolve, since a majority has continuously awarded the state of press freedom a score of at least "good".

1. PRESS FREEDOM INDEX

Of the three groups, only media managers gave the state of press freedom in Hungary a score of “rather good”. The general public has a “neither good nor bad” view, while journalists perceive that the situation is “rather bad”. As compared to last year, the rate of change was small in the case of all three groups, in other words there was no significant shift in the opinions of the respondents in this group. Though the change since 2013 has been minor, the views of the groups surveyed diverge.

Journalists assess that the state of press freedom has deteriorated each year. While in 2012 they gave press a freedom an almost median score on a scale of 1-10, by 2014 the average numbers they indicated had slipped to slightly over 4 points. The general public’s assessment, however, has improved somewhat and is now almost at the medium value. Media managers’ view of press freedom is more difficult to interpret, however – it increased by almost one point between 2012 and 2013, and then dipped slightly in 2014. Media managers were the only group among the three interviewed whose average assessment of press freedom was leaning towards good.

↓ *Press Freedom Index (Scale 1-10)*

	2012	2013	2014	Change
General public	4.6	4.6	4.9	Improved
Journalists	4.8	4.3	4.1	Deteriorated
Media managers	5.4	6.2	5.9	Deteriorated

The negative change in the opinions of journalists is still most significantly shaped by how the media outlets they work for relate to politics. In other words there is an increasing number of people who feel that the degree of political and business pressure is on the rise, and these journalists take an increasingly dire view of the state of domestic press freedom.

Similarly to journalists’ perceptions of press freedom, media managers’ views also tend to be influenced by how media relates to politics. Yet despite the slight deterioration in their assessment of press freedom, managers still have a more optimistic take on press freedom. This result is obviously influenced by the size of the sample and its composition: media managers who work for media outlets with more critical views have declined to answer.

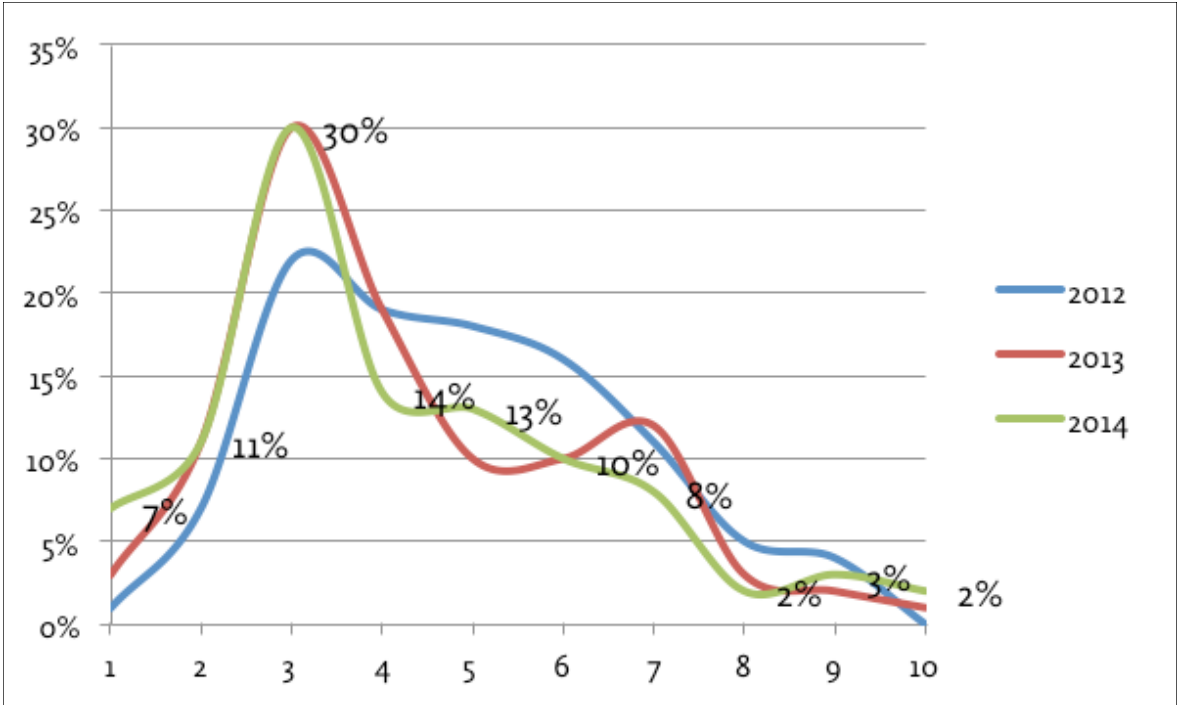
Just as in previous years, party preferences have the greatest impact on the views of the general public. Fidesz voters assess the state of domestic press freedom as leaning towards good, while MSZP voters have a more negative outlook. Non-voters also take a dim view of the state of press freedom. The general public’s perceptions have improved somewhat since 2013, which is probably explained by shifts in party preferences. The share of Fidesz supporters has risen by 7% since 2013, while the proportion of MSZP voters has declined by 3%. In other words with the growth in the share of Fidesz voters, the number of those who have a more positive assessment of the state of press freedom has increased as well. The survey of the general public was conducted in September 2014, and it reflects the public’s party preferences at the time.

1.1. Journalists

As the diagram below shows, journalists’ view of press freedom is obviously continuously deteriorating. A closer look at the distribution of the index reveals that while in each, 2013 and 2014, the worst score was given by the same share of respondents, and 30% of all respondents awarded a score of 3 in both years, the share of those who submitted scores that suggest a positive assessment overall has either stagnated or declined.

In both years the share of those who think that the state of press freedom deserves a score between 1-3 – in other words bad – ranged between 45% and 48%. In contrast, the share of those who awarded press freedom a score of 8 or higher – in other words those who think that press freedom is doing well - stood at 6% in 2013 and 7% in 2014.

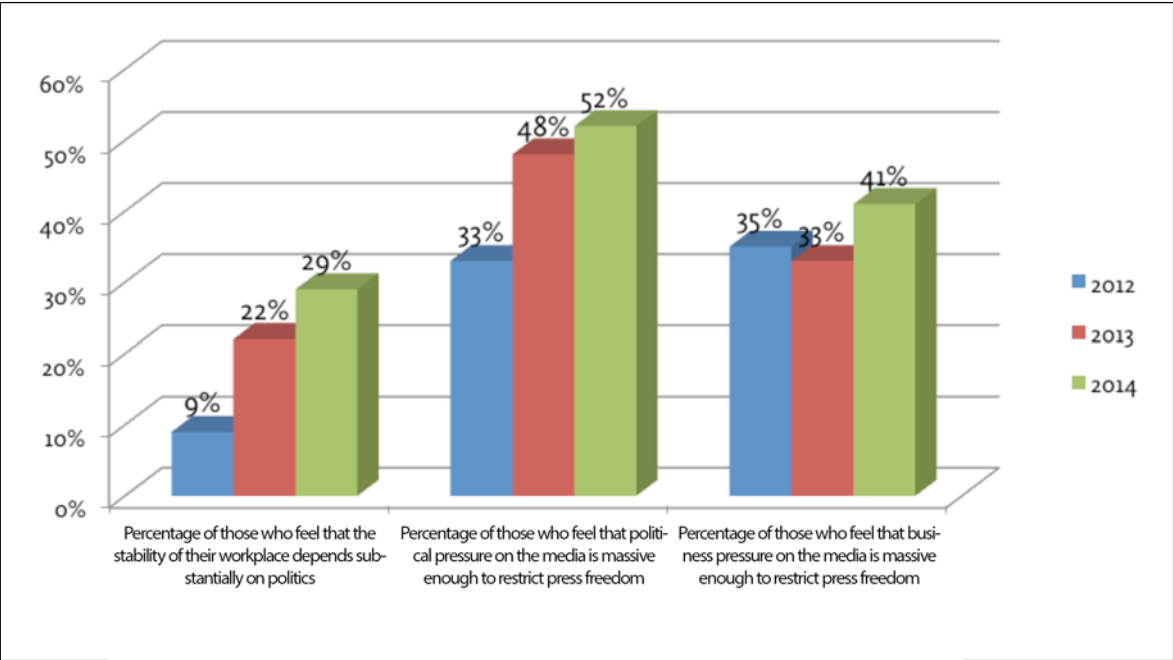
↓ *The distribution of journalists' assessment of press freedom over time*



On the one hand, the assessment of press freedom is connected to perceptions to the political and economic pressure brought to bear on the media. On the other hand it is also influenced by the responding journalists' employers. Those who think that political and economic pressure on the media is weak gave press freedom an average score of 6, in other words they saw it as being in good shape. Those, however, who think that the level of prevailing political and economic pressure is significant gave it only a score of 3, that is they have a negative assessment of the state of press freedom. This assessment is also influenced by journalists' place of employment. The views of journalists working for print and online outlets match the average of the overall sample, that is the average score they gave in 2014 was around 4.1 points. Journalists working in public service television and radio took a more positive view, however, as they gave press freedom a score of almost 6 (5.7). Journalists working for commercial television and community radio, on the other hand, had a worse than average perception of the state of press freedom, giving it an average value of 3.

In journalists' assessment, political independence continues to be the most important element of press freedom. The overall deterioration in their average assessment is probably also influenced by the fact that there is an increase in the share of those who perceive that politics threatens media to an extent that effectively curtails press freedom. The data show that the share of those who perceived the level of political and economic pressure to be at maximum strength, or who assessed that the financial stability of their workplace was to a great extent contingent on politics, has grown each year under observation. Over the three years investigated, the proportion of those who held that their workplace is financially very dependent on politics has risen from 9% to 29%, while we observed a surge from 33% to 52% in the share of those who believe that the prevailing levels of political pressure limit press freedom.

↓ Journalists' opinions about the independence of media from politics



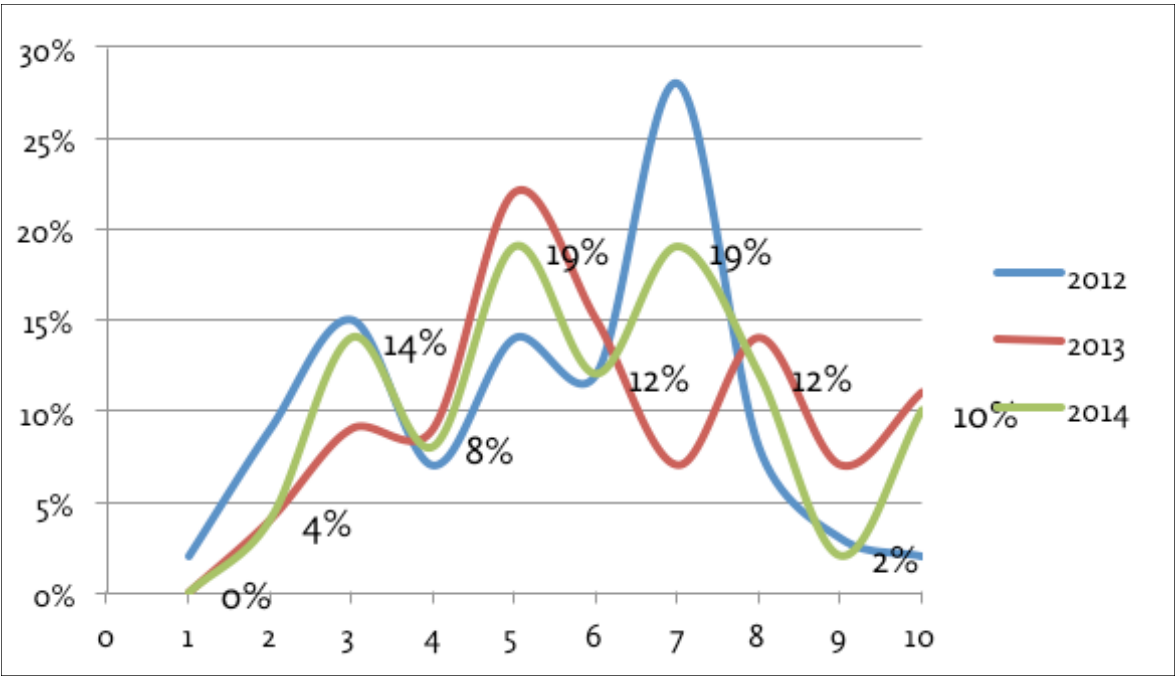
If we look at the relationship between political and business pressure on the one hand, and press freedom on the other, we observe that journalists perceive a closer relationship between these two variables than previously. As compared to last year, the assessment of press freedom has deteriorated among those who assess that political and business pressure on the media is very strong. In other words perceptions of the degree of political pressure are substantially influenced by how respondents viewed the state of press freedom. The worse respondents' assessment of pressure, the worse their view of press freedom.

	...assess that the average value of the press freedom index is	
	2013	2014
Those who believe that there is substantial political pressure on the media...	3.7	3.3
Those who believe that there is substantial business pressure on the media...	3.6	3.2

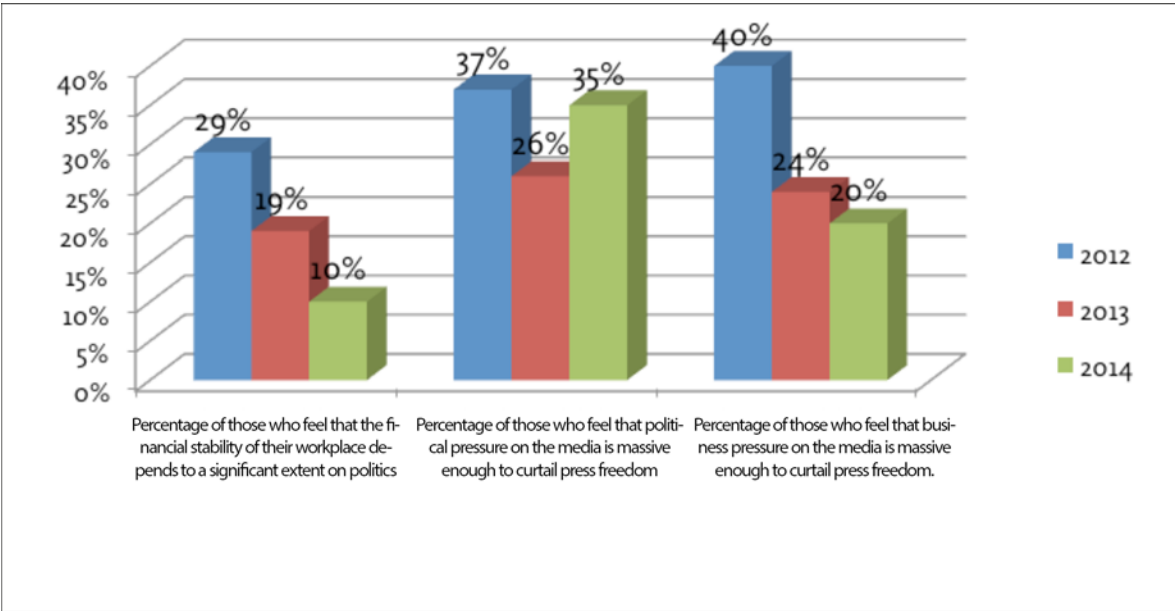
1.2. Media managers

The following graph shows the deep polarisation in media managers' views of press freedom. Yet despite this polarisation, there is also a trend in how managers' opinions evolved; the majority has a positive assessment of the prevailing level of press freedom. The ratio of those who gave press freedom a good score (6 or higher) was equally high in all three years, at 53% in 2012, 54% in 2013 and 55% in 2014. It appears therefore that despite the regulatory changes, the majority of media managers are content with the prevailing level of press freedom.

↓ *The distribution of media managers' press freedom index*



↓ *Media managers' opinions about the independence of media from politics*



Aln the graph above we present three sets of responses over time: the share of those who perceived the highest levels of political pressure or business pressure, respectively, and those who assessed that the financial stability of their workplace depends significantly on politics.

The proportion of managers who perceived high levels of business pressure, and of those who believe that the financial viability of their workplace depends significantly on politics, have been declining each year. Over the course of three years, the share of those who believe that business pressure on the media is significant has halved.

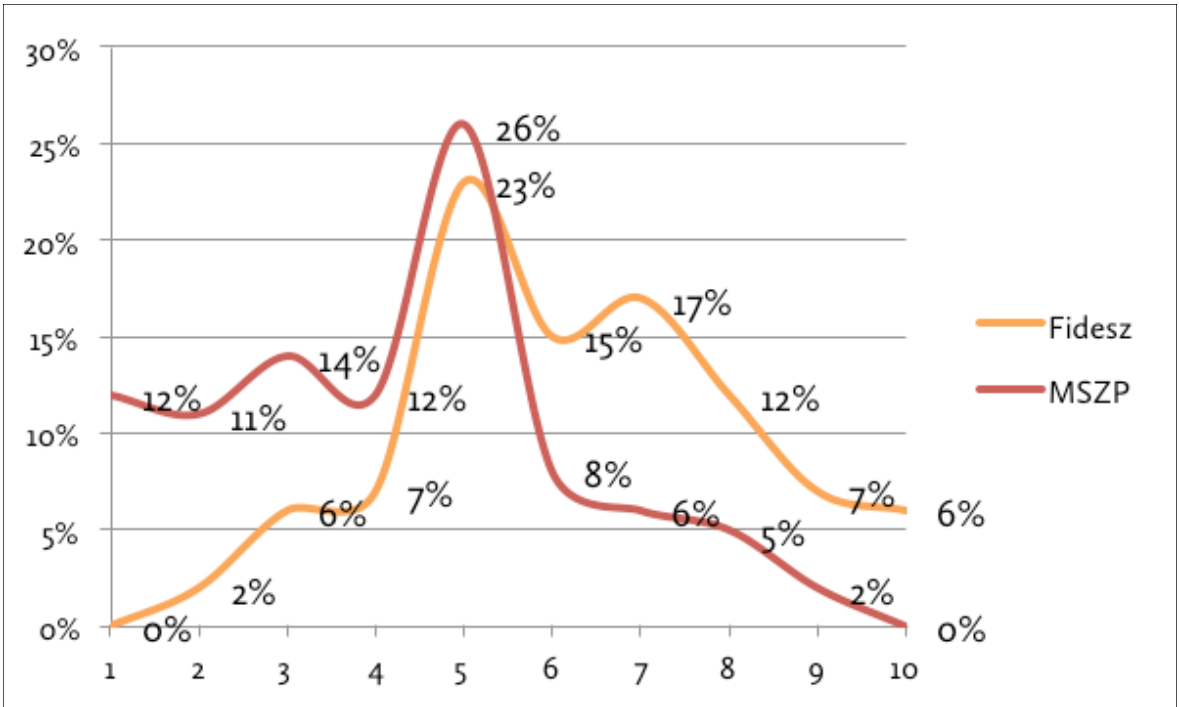
Following an improvement in 2013, however, political pressure was regarded as very strong by 35%. In other words perceptions of political pressure on the media have deteriorated as compared to the previous year. Managers' views of political pressure are polarised, for 18% perceive no political pressure whatsoever, while 55% assess that there is some level of political pressure on the media (this is the percentage of those who gave political pressure a score of 3 or 4).

1.1. General public

Party preferences have the greatest impact on the perceptions of the general public. Voters who support Fidesz/the governing parties have a positive view of domestic press freedom, while MSZP/opposition voters take a negative view thereof. There has been some improvement in the general public's assessment of press freedom since 2013, which is most likely explained by shifts in party preferences. There were 7% more Fidesz voters in September 2014 than in the previous year, while the share of MSZP voters has declined by 3%. In other words as the share of Fidesz voters grew, there has also been a rise in the proportion of those with a positive perception of press freedom.

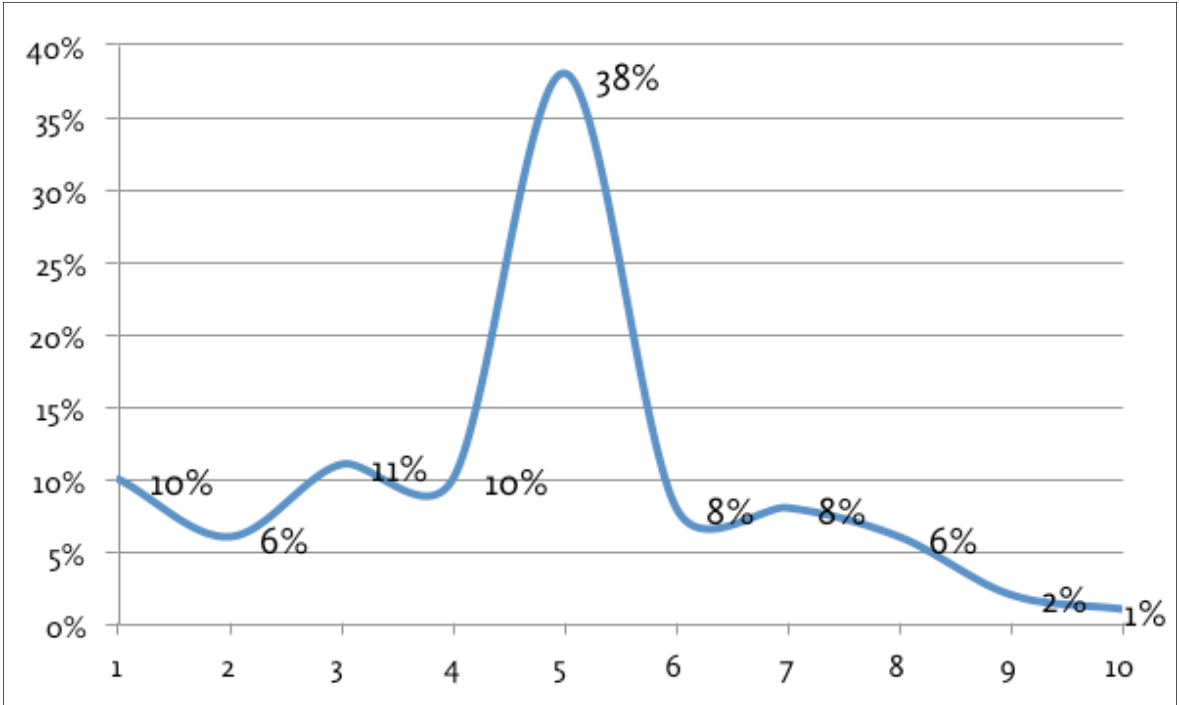
Since 2012 a majority, almost 60%, of Fidesz voters has given the state of press freedom a score of 6 or higher, while roughly 60% of MSZP voters (55% in 2013 and 63% in 2014) gave the state of press freedom a score of 4 or worse.

↘ The distribution of the Press Freedom Index by party preferences (2014)



Though in all three years under investigation party preferences had the greatest impact on the public's view of press freedom, on the whole the general public also assessed that the relationship between media and politics and the issue of political independence are reflected in the prevailing level of press freedom. Those namely who perceived significant levels of political pressure gave press freedom a score of 4.2, while those who did not perceive any political pressure whatsoever gave it an average score of 7. .

↓ The distribution of the general public's Press Freedom Index - respondents who are non-voters (2014)



Non-voters without party preferences gave press freedom a below average score of 4.1 On the whole, 37% of them assessed in 2014 that press freedom is not in a good state in Hungary, while 25% perceived that press freedom was doing fine.

2. FACTORS THAT IMPACT WHETHER THE INTERESTS OF PRESS FREEDOM PREVAIL

In the following, we examined a series of statements to gauge the impact each had on respondents’ assessment of press freedom. The statements were pre-selected by us based on our assessment that they are important. What we sought to find out was how important these factors are in the perceptions of media managers and journalists. We used a weighted index in the analysis to show in numerical terms how opinions evolved.

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

	Journalists			Media managers		
	2012 weighted score	2013 weighted score	2014 weighted score	2012 weighted score	2013 weighted score	2014 weighted score
the distribution of state advertising expenditures and subsidies is transparent	*	83 points	87 points	*	80 points	90 points
the state allows market mechanisms to prevail in the advertising market and does not use official instruments to meddle in these	*	*	80 points	*	*	67 points
the relations between owners, management and newsrooms are transparent	*	*	76 points	*	*	70 points
the media authority is not exclusively made up of delegates nominated by political parties	83 points	79 points	76 points	75 points	60 points	84 points
public officials may be freely criticised without fear of legal reprisals	*	78 points	82 points	*	68 points	60 points
only independent courts and no other authorities have the authority to exercise official oversight over print and online press products	80 points	77 points	78 points	51 points	43 points	64 points
there is no political connection between media agencies and political parties	*	*	74 points	*	*	62 points
the regulatory and financial framework governing the advertising market is stable and predictable	*	*	72 points	*	*	70 points
there are no intertwinelements between media owners and political parties	82 points	72 points	67 points	67 points	73 points	69 points
the editorial team bears no responsibility for comments on editorials, the responsibility rests entirely with the commenter	*	*	62 points	*	*	53 points
the work of the editorial team is governed by an ethics code (which also includes provisions concerning the relations between owners, management and the editorial staff)	73 points	69 points	57 points	66 points	58 points	60 points
a strong professional organisation represents the interests of journalists	47 points	67 points	64 points	60 points	46 points	41 points

self-regulation makes up a significant share of all relevant regulations	56 points	60 points	53 points	62 points	40 points	60 points
publicly funded public service broadcasting is available	28 points	39 points	20 points	42 points	38 points	38 points
journalists have a real say in selecting their editor-in-chief	26 points	36 points	35 points	19 points	8 points	33 points
media products tend to be Hungarian-owned	-48 points	-47 points	-47 points	-3 points	9 points	-7 points

2.1. Journalists

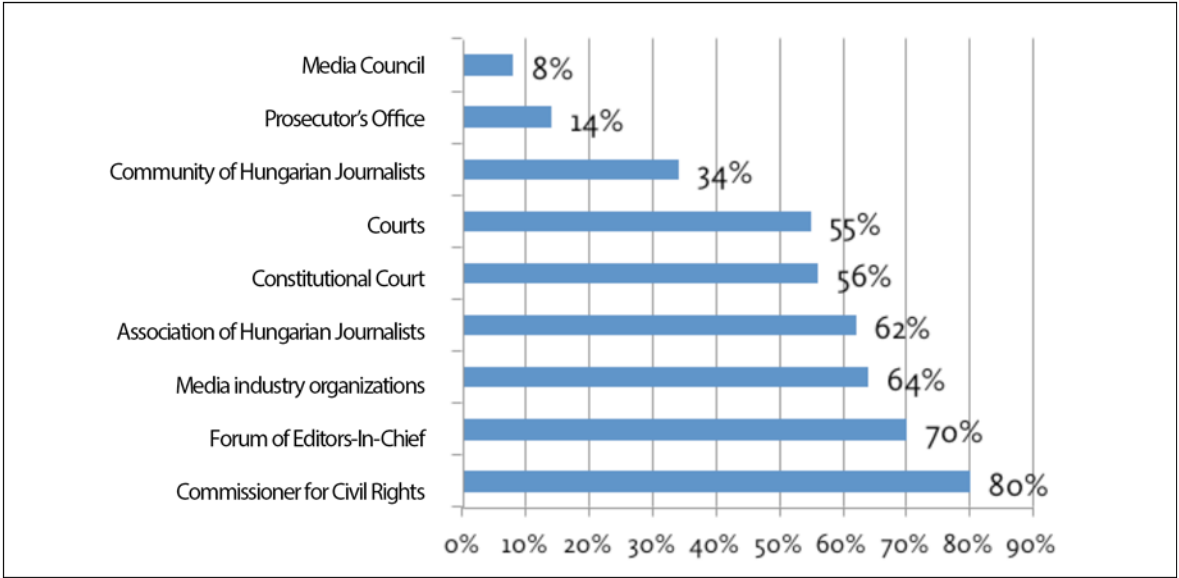
The changes in the factors that impact the effectuation of press freedom show that journalists also react swiftly and rather sensitively to governmental measures. Journalists assess that the free operation of the advertising market - also including the closely related transparency of state advertising spending - and the freedom to criticise public figures were the two most important elements that determined whether press freedom prevailed in 2014. Interestingly, these were the only two factors whose importance grew as compared to the previous year. It appears therefore that in journalists' assessment there is an economic precondition that must be met for press freedom to prevail, namely the transparent operation of the advertising market, and within that of the market for state advertising; and there is a precondition underlying free expression, namely the freedom to criticise public figures.

A closer look at the responses reveals a ranking of sorts, for the intertwinements between media owners and political parties lost 15 points in significance presumably because new and more current factors have gained in importance, such as for example transparency in state advertising spending.

While in the previous two years the top issue was that the Media Council was filled only with political appointees, by 2014 the political dependence of the increasingly irrelevant Media Council ranked only fifth among the most important elements affecting press freedom. Similarly to the media authority, the intertwinement of media owners and political parties is also regarded as less important than previously in shaping press freedom. Since 2012 this factor has lost the greatest ground in terms of its importance, 15 points overall. It appears that in assessing the prevailing relations between media and politics, journalists regard the free operations and the transparency of the advertising market as the most important consideration. Factors concerning professional independence (we included the importance of the professional organisations representing journalists, journalists' say in electing their editors-in-chief and self-regulation under this heading) have also declined in significance, while the operation of public service broadcasting was mentioned as important by a mere 20% in 2014, thus falling into the penultimate position. It seems journalists' hopes in self-regulation are diminishing, as the statement "the work of the editorial team is governed by an ethics code" has lost 16 points over the past three years. The representation of professional interests is becoming ever more important, however, since the significance of strong professional organisations has surged by 17 points over the past three years.

This year we not only looked at the various factors that affect whether press freedom prevails, but also sought to investigate whether the institutions that undergird the operations of the media and the independent organisations with such functions contribute to press freedom. We listed specific institutions in the questionnaire; professional organisations as well as the prosecutor's office – in addition to courts and the ombudsman – were included in the list because we thought that the way official penal policy relates to criminal proceedings against journalists is also a factor that impacts press freedom. Prosecutors' activism in this regard, or their pronounced passivity, is also capable of exerting an influence on press freedom.

↓ Which of the following factors has the greatest impact on whether press freedom prevails? (2014)



Professional organisations played the greatest role among these institutions. In 2014, journalists assessed that following the institution of the ombudsman, professional organisations, to wit the Forum of Editors-in-Chiefs, media industry organisations and the Association of Hungarian Journalists (MÚOSZ) played the greatest role in asserting the interests of press freedom. The fact that merely 56% designated the Constitutional Court and only 55% mentioned the role of ordinary courts can be interpreted as strong criticism of these institutions. These data reveal massive underlying distrust towards these institutions. The fact that only 8% of responding journalists assessed that the Media Council promotes press freedom is a good indication of the problems that plague press freedom in Hungary.

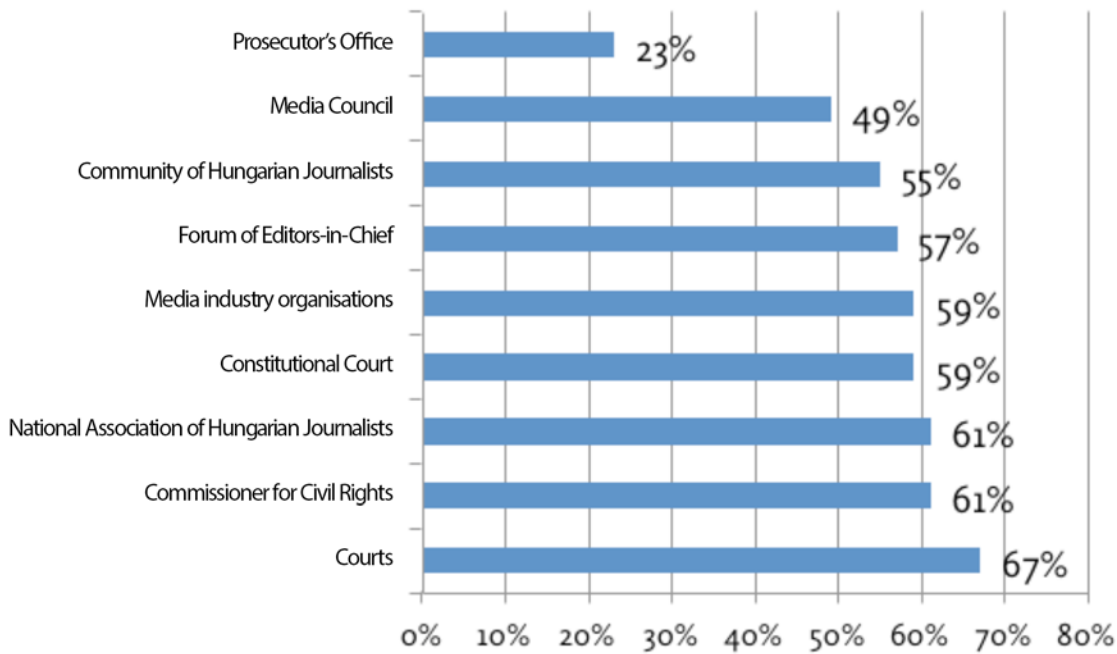
2.2. Media managers

Managers assess that the transparent distribution of state advertising and subsidies are the most important preconditions of press freedom. Since 2013, the weighted average of opinions on the role of this factor has surged by 10 points, and the 90-point average this year implies that there is a consensus among respondents: this precondition matters. The notion that the media authority should not be exclusively made up of candidates nominated by political parties came in as the second most important precondition. Here, too, the increase over 2013 is remarkable.

We saw the most positive shift in opinions concerning aspects related to professional independence. There has been a 25-point surge since 2013 in the importance accorded to the statement “journalists should have a real say in selecting their editor-in-chief”. The role of independent courts also rose significantly in the esteem of managers, while self-regulation has declined in importance. The fact that media

organisations succeeded in several lawsuits involving freedom of information requests in 2014 obviously played a role in the more positive assessment of courts.

↓ Which of the following institutions help press freedom prevail? (2014)



Media managers perceive that the Prosecutor’s Office and the Media Council are least active in promoting press freedom. At the same time, a majority of respondents assessed that the other institutions listed in the questionnaire play a role in promoting press freedom rather than restricting it. However, those that take a critical view of the state of press freedom have more trust in institutions that represent media professionals.

2.3. Comparing Opinions

Journalists and managers believe that the free operation and transparency of the media are the most important factors in helping press freedom prevail. Respondents in both groups regarded the transparent distribution of state advertising spending as the most important elements underlying this. An interesting difference is that while journalists now perceive that the media authority is not a relevant player in terms of press freedom, managers still consider it crucial that the authority should not be made up exclusively of delegates nominated by political parties.

Nor do the views of managers and journalists coincide on the ranking of institutions in terms of their role in ensuring press freedom. While managers look to the courts as the most important institutions, journalists ranked the ombudsman first, courts came in only sixth. Managers and journalists also assess the role of the Media Council differently: While journalists consider that the Media Council does not at all contribute positively to promoting press freedom, almost half of responding media managers assessed that it does. The two groups’ opinions also differ in that journalists perceive that over the past three years the Media Council’s role in press freedom has declined, while managers think it has increased.

3. ASSESSMENTS OF HOW THE MEDIA WORK

Through this group of questions we sought to ascertain the three groups’ general impressions of how the media work, and whether there were any changes in this respect over the past year. We formulated a set of statements which in our assessment might have an influence on the state of the media and the way it operates. We administered the same set of questions to managers and journalists, but gave respondents in the general public fewer questions, leaving out some that we assessed as too technical. We used a weighted index in the analysis to show in numerical terms how opinions evolved.

Respondents did not know last year’s results and hence their answers were not formulated as comparative assessments but as their current impressions. Respondents’ overall impression of how the media system works emerges from the changes in the average score they awarded during these years. Thus the table below shows how the opinions of journalists and managers evolved, respectively, since we first collected data in 2012. In those cases when the negative scores were higher than last year, respondents perceived a deterioration, and where positive scores were awarded or the negative scores were close to a value of zero, they observed improvement. The basis of comparison is the first data collection in 2012.

↘ *How did it change? (deteriorated=-100 points, no change=0 points, improvement=+100 points)*

	Journalists			Media Managers		
	2012	2013	2014	2012	2013	2014
intertwinement between media enterprises and political parties	-60 points	-83 points	-86 points	-40 points	-39 points	-47 points
the esteem in which journalism is held	-59 points	-81 points	-72 points	-49 points	-41 points	-33 points
the quality of public media services	-69 points	-79 points	-80 points	-16 points	-4 points	-14 points
operating conditions of media enterprises	-65 points	-77 points	-90 points	-45 points	-39 points	-45 points
legal conditions underlying the work of journalists	-67 points	-70 points	-69 points	-22 points	-17 points	-20 points
diversity of opinions in the media	-47 points	-65 points	-67 points	-15 points	+2 points	-8 points
the reliability and predictability of the media authority’s operations	-50 points	-50 points	-38 points	-24 points	+15 points	-2 points
amount of content that is harmful to minors	8 points	-18 points	+1 points	+38 points	+7 points	+2 points

3.1. Journalists

While in 2013 the most substantial deterioration over the previous year was perceived in the esteem of journalism as a profession, in 2014 journalists saw the most substantial negative change of 13 points in the underlying operating conditions of media enterprises. It appears that the answers to various questions mutually reinforce one another in showing that for journalists the changes in their own working conditions were the biggest problem in 2014. It is conceivable that this perception of the change in the operating conditions was also due – in addition to other factors - to the sudden and extremely quick introduction of the advertising tax.

Journalists did not perceive any significant changes in public service broadcasting, the legal conditions underlying their work or the diversity of opinions. They sensed some improvement over last year in terms of the esteem in which journalism is held, the predictability and reliability of the media authority’s work and the amount of content that is harmful to minors.

3.2. Media managers

In the assessment of media managers the balance of answers in 2013 was positive in three areas, but in 2014 only a single such area remained: the amount of content that is harmful to minors. Interestingly, however, managers' impression is that the amount of content that is harmful to minors has grown each year, since the assessment of this particular item on the list has fallen by 36 points over the past three years. The esteem in which journalism is held, by contrast, has been improving each year, though it continues to be seen very negatively.

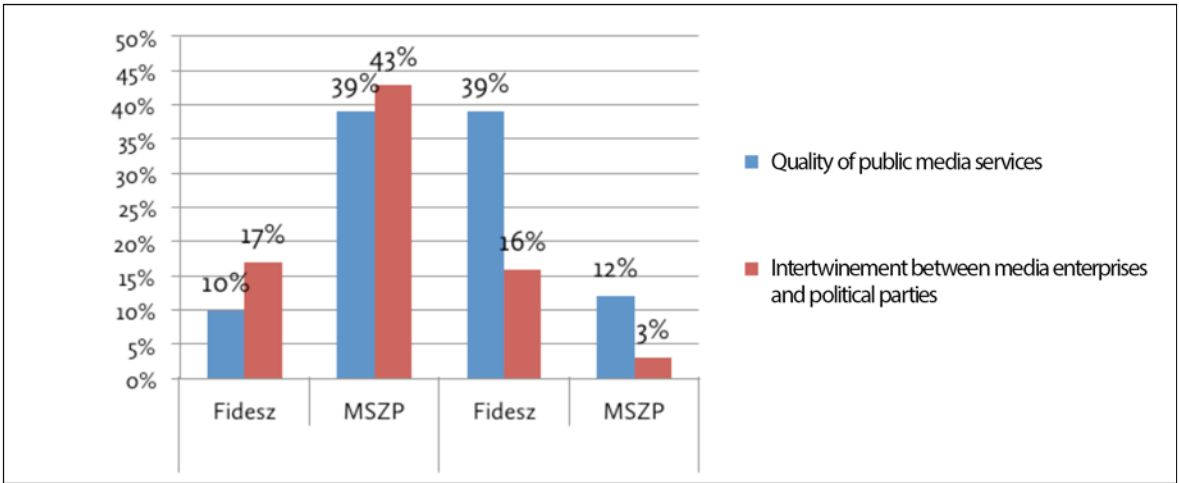
3.3. General public

↓ How did it change? (deteriorated=-100 points, no change=0 points, improvement=+100 points)

	2012	2013	2014
the esteem in which journalism is held	-24 points	-15 points	-15 points
the quality of public media services	-14 points	-5 points	-5 points
the amount of content that is harmful to minors	-12 points	-5 points	-8 points
the diversity of opinions in the media	-17 points	-15 points	-11 points
intertwinement between media enterprises and political parties	-26 points	-25 points	-26 points

The assessment of press freedom did not change substantially. It appears that the media is continuously perceived as working badly, but the rate of deterioration is slow. Nevertheless, looking simultaneously at the data from the last three years suggests that in the general public's assessment there has been a definite, albeit slow improvement in the quality of journalism and public media services. Though the general public's views are most positive in this regard, the assessment of the intertwining of media enterprises and political parties was given the lowest score by all groups, including the public.

↓ Changes in the opinions of the general public in a breakdown by party preferences (2014)



In this case, too, party preferences have the greatest impact in terms of changing public opinion. Among MSZP voters, 39% consider that the quality of public service media has declined, while the same proportion of Fidesz voters, that is 39%, consider that it has improved.

3.1. Comparing opinions

According to the opinions of journalists, the situation has tended to become worse since 2012, as their assessment of all statements has become more negative since then. Nor does the public have a better impression of the way the media operates, which is apparent in the fact that respondents in this sample awarded negative scores on all statements. Nevertheless, the rate of deterioration was slower in their case than in the assessment of journalists. It appears that the opinions of journalists and media managers are, though not flat-out contradictory, rather divergent. As regards both, press freedom and the changes perceived since 2012, journalists tend to take a more dim view, while managers perceive improvements in the state of the domestic media.

4. POLITICAL AND ECONOMIC PRESSURE ON THE MEDIA

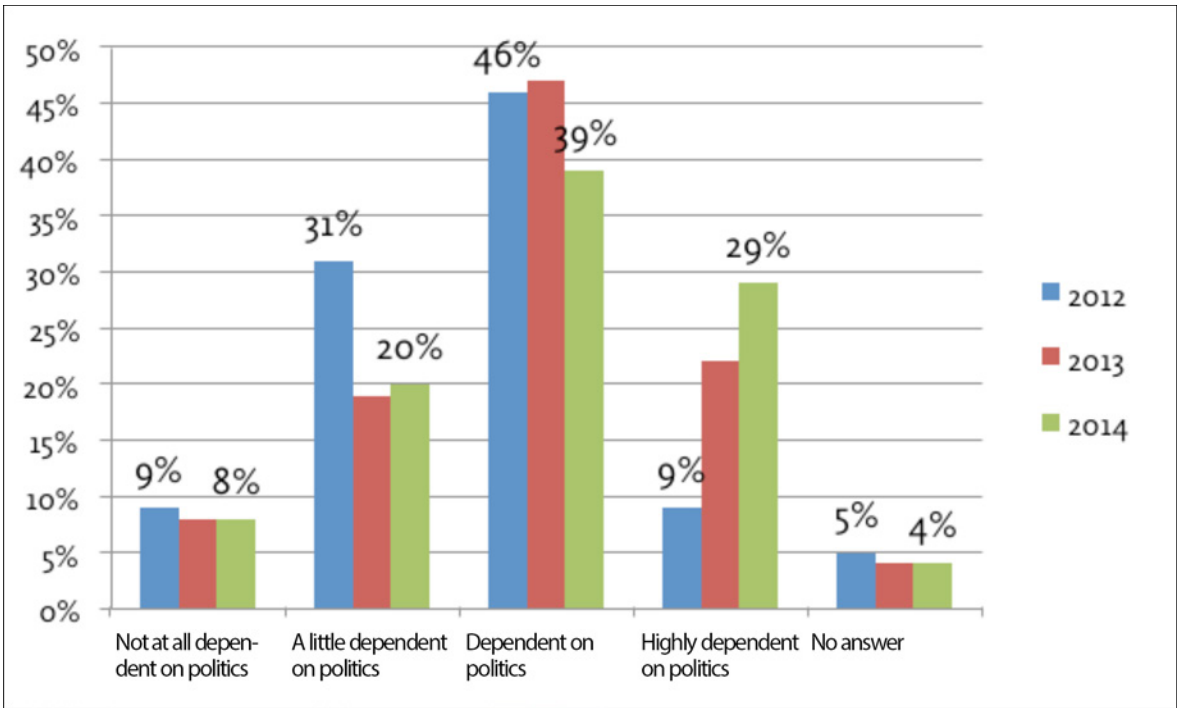
Political and business pressure, seen here as the two constitutive elements of media independence, may be even more decisive in terms of shaping press freedom. Those in the profession, that is journalists and managers, are in agreement in terms of their assessment that business and political pressure have the greatest impact on press freedom.

We deliberately refrained from precisely defining pressure. What we sought to do instead was to find out what each of the three groups consider pressure and how much of it they perceive.

4.1. Journalists

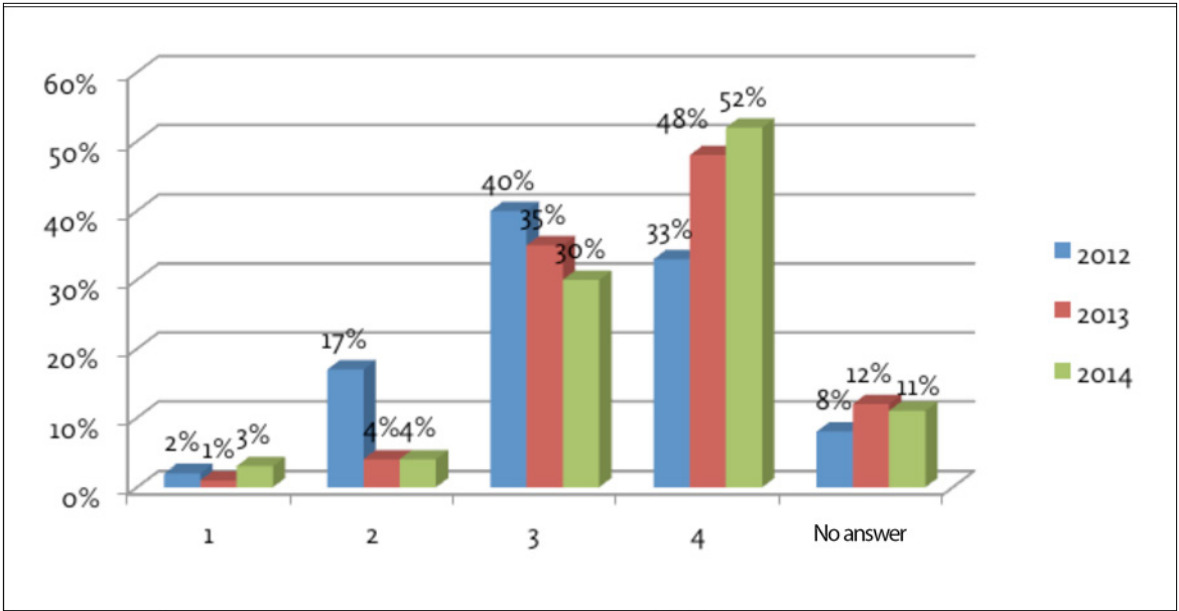
The journalists surveyed assessed that the media are increasingly dependent on politics. The share of those who held that the financial viability of their workplace depends on politics only to a minor extent fell by 11%, while the percentage of those who feel that their place of employment is significantly dependent on politics surged from 9% to 29%. The trend is unequivocal, the share of those who feel that their workplace and the media in general are financially dependent on politics is continuously on the rise.

↓ *To what extent is the financial background of your workplace dependent on politics?*



According to journalists, political pressure is among the greatest problems in Hungary today. The graph below shows that since 2012 there has been a nearly 20% rise in the share of those who perceive that political pressure is substantial enough to curtail press freedom, while the ratio of those who believe that this pressure is minor has shrunk by 13%.

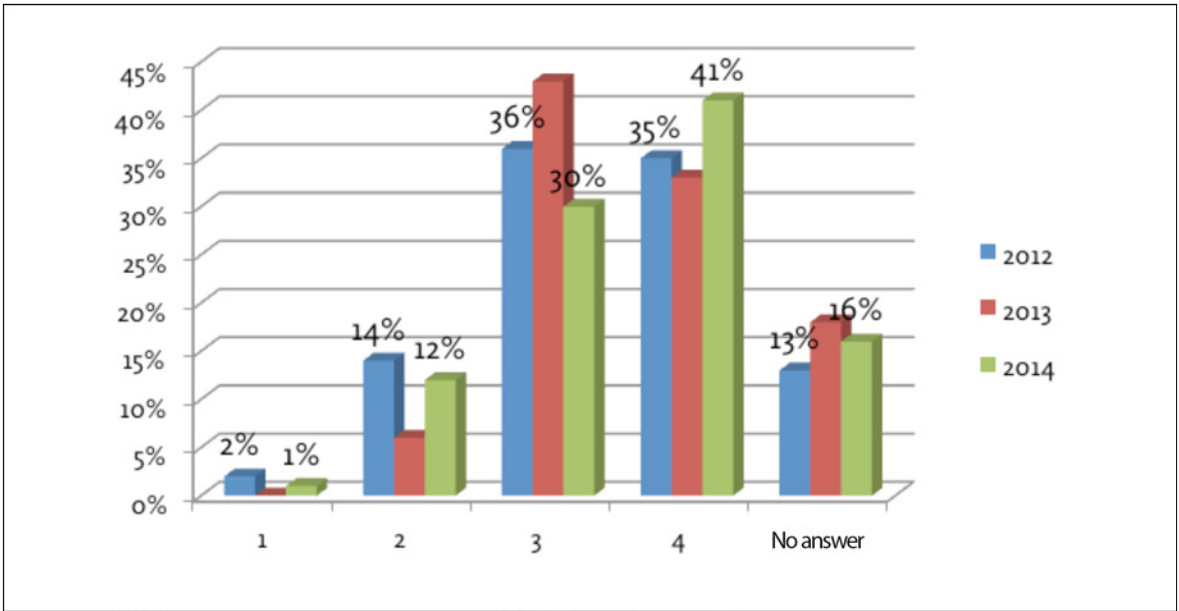
↓ How strong is the political pressure on the Hungarian media in your opinion?
(A value of 1 indicates that there is no pressure, while a 4 indicates that the prevailing pressure is strong enough to curtail press freedom in Hungary)



The gravity of the problem is highlighted by the fact that in 2014 more than half of surveyed journalists indicated that political pressure on the press is substantial enough to limit press freedom.

It is important to note that assessments of political pressure are to a significant extent coloured by personal experience. Among journalists who stated that they had personally experienced political pressure, 75% felt that political pressure was substantial enough to curtail press freedom. Among those who have not had such an experience, only 42% had the impression that political pressure was massive.

↓ How strong is the business pressure on the Hungarian media in your opinion?
(A value of 1 indicates that there is no pressure, while a 4 indicates that the prevailing pressure is strong enough to curtail press freedom in Hungary)



views of business pressure, there was also an increase in the share of those who felt that it was massive enough to threaten press freedom. At the same time, 12% of respondents assessed that business pressure was minor in strength. Respondents felt that as compared to political pressure, business pressure was less significant.

While among those working in the print media a mere 36% viewed business pressure as substantial, the proportion of those who shared the view of business pressure as being massive reached 56% among respondents working for online media. It is conceivable that online media are more exposed to business pressure, since just as in the case of political pressure, perceptions of business pressure also significantly correlate with personal experience.

4.1.1. Instruments of pressure

The responses indicate that the methods used to exert pressure have not changed during the three years we investigated, respondents ranked the role of various instruments in the same order. In line with their perception that pressure has grown, however, the role of individual instruments has also gained in importance. The processes observed in 2013 appear to be ongoing still, that is the role of business instruments continues to be more important than the role of political instruments.

Journalists perceive therefore that the degree of political pressure has grown substantially, while business pressure is rising less sharply, though discernibly as well. The instruments of pressure tend to be typically business instruments, however. The most important instrument of pressure is the distribution of state advertising. The role of business influence is underlined by the fact that journalists listed the advertising tax in second place among the instruments. The rise in the significance of decisions taken by private advertisers could result from the growing dependence on individual advertisers in a shrinking media market.

Among political instruments, respondents gave substantially greater weight to the indirect influence of politicians and the media authority's decisions -or rather the possibility of such decisions being rendered.

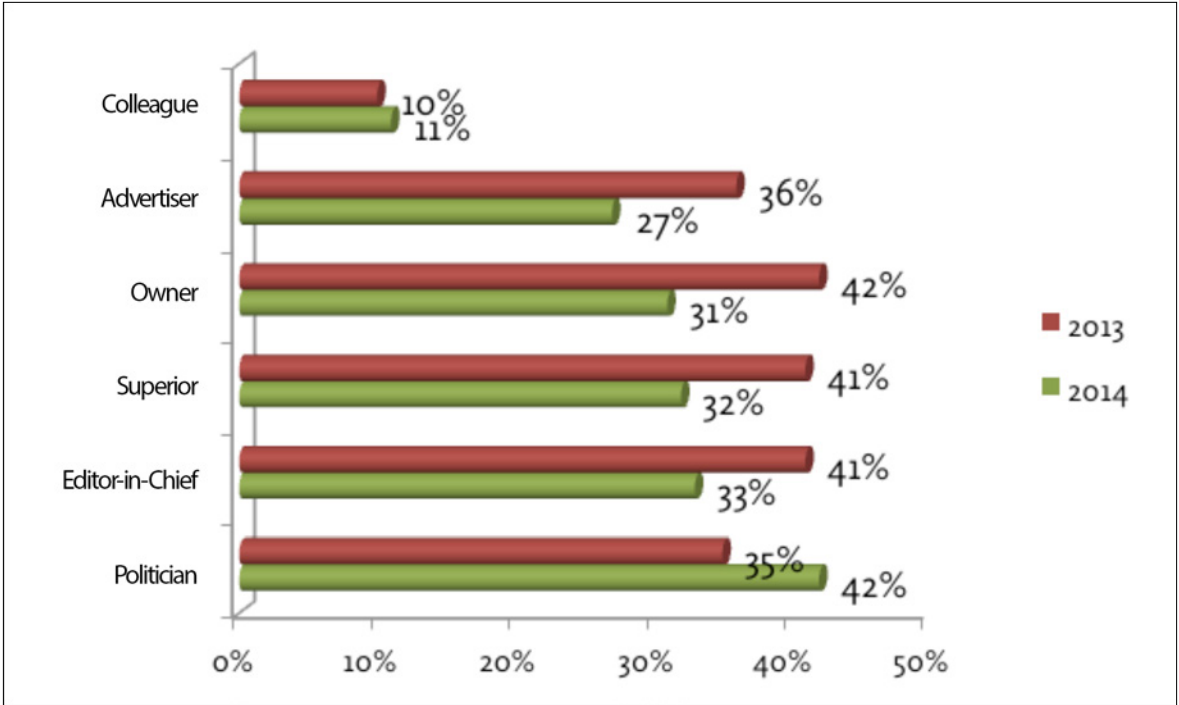
↓ *In your assessment, how important is the role of the following instrument in pressuring media?*
(weighted index: no role at all in exerting pressure= -100 points, plays a significant role=+100 points)

	2012	2013	2014
advertising decisions by the state (withdrawal of advertisements due to critical content, rewarding friendly content)	+44 points	+54 points	+52 points
Introduction of the advertising tax			+40 points
Indirect pressure on journalists by politicians through editors and management	+28 points	+36 points	+39 points
the role of various media authority decisions (fines, licences, frequency permits)	+21 points	+29 points	+33 points
Indirect pressure on journalists by advertisers through editors and management	+26 points	+27 points	+31 points
advertising decisions by commercial advertisers (withdrawal of advertisements due to critical content, rewarding friendly content)	+9 points	+19 points	+23 points
direct pressure on journalists by politicians (phone calls, direct relations)	+4 points	+7 points	+6 points
direct pressure on journalists by advertisers	-11 points	-4 points	-3 points

4.1.2. Sources of pressure

It seems contradictory that even though as compared to previous years journalists feel both types of pressure to be stronger today, we nevertheless observe that the respective levels of pressure from owners, superiors and editors-in-chiefs have significantly declined. Only pressure from politicians has grown significantly.

↓ Please appoint the pressure was exerted by? (2014)



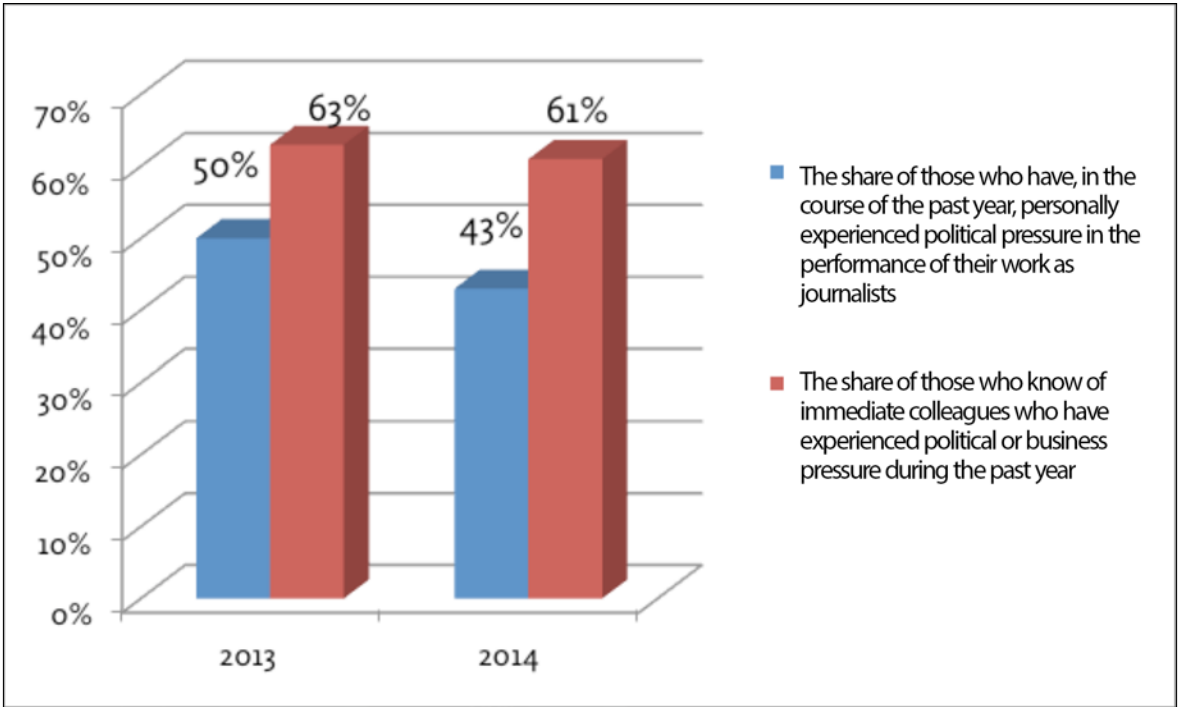
4.1.3. Personal experience

Political pressure

The ratio of those who have personally experienced political pressure stood at 50% in 2013 and dropped to 43% in 2014. An interesting and contradictory aspect of this phenomenon is that while journalists assess that political pressure on the media is continuously on the rise, the personal experiences of responding journalists do not reflect this trend. The proportion of those who assess that political pressure on the media is so substantial that it threatens press freedom has almost doubled since 2012. By comparison, the percentage of those who have personally experienced pressure did not grow commensurately with the prevailing sense of political pressure. In fact, since 2013 the ratio of those who have personally experienced political pressure has dropped by 7%.

Generally it is a lot harder for us to say bad things about ourselves than about others, which may be one explanation for why there are more journalists who assume that their colleagues have been subject to pressure than journalists who personally report such an experience. Even as 50% of journalists indicate that they have had such an experience – in 2014 it was only 43% –, when it comes to their colleagues, 60% assume that they were personally subjected to pressure.

↓ *Political pressure based on persona experience/general assumptions*



Political pressure manifests itself in one of two ways: concealing certain issues or informing the public in a way that fails to accurately reflect reality. Among those who have experienced political pressure, 50% resorted to the former while 30% engaged in the latter. Since it was possible to select more than one answer, the responses cannot be aggregated. It is therefore conceivable that there are journalists who have employed both methods.

Business pressure

Over the past two years, 50% of respondents have personally experienced business pressure in the course of their work, though among editors the share of respondents who have had such an experience has diminished significantly. While in 2013 72% of the editors had personally made such an experience, in 2014 this ratio had shrunk to 58%. Among journalists, the proportion of those who had experienced pressure held steady at 50% over these two years.

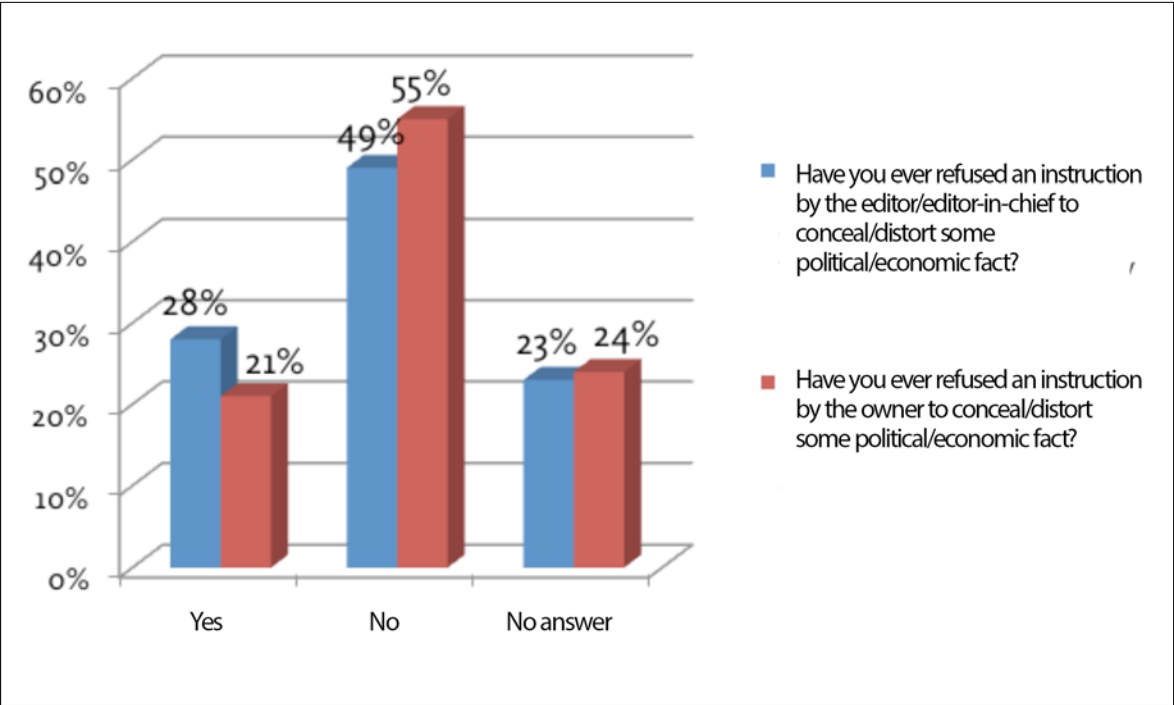
Just as in the previous years, business pressure was primarily exercised by advertisers and politicians. Advertisers and politicians prefer content that casts a favourable light on them, while they strive to impede the dissemination of unfavourable contents. But pressure might also be exerted to ensure that a certain issue is not addressed, that nothing at all appears about in the press. Journalists are subject to business pressure in the form of existential threats, such as the loss of their jobs or forgoing pay raises.

Resistance

Based on the results of the previous years, we included a new issue among the questions concerning pressure. What we sought to find out was whether journalists sought to resist instances of strong political or business pressure.

First of all, we have to point out that in light of the degree of pressure experienced, the rate of non-compliance with demands was rather high. In the case of instructions by editors or editors-in-chief this ratio was 28%, while in the case of instructions given by owners it was 21%.

↓ Resistance to political/business pressure (2014)

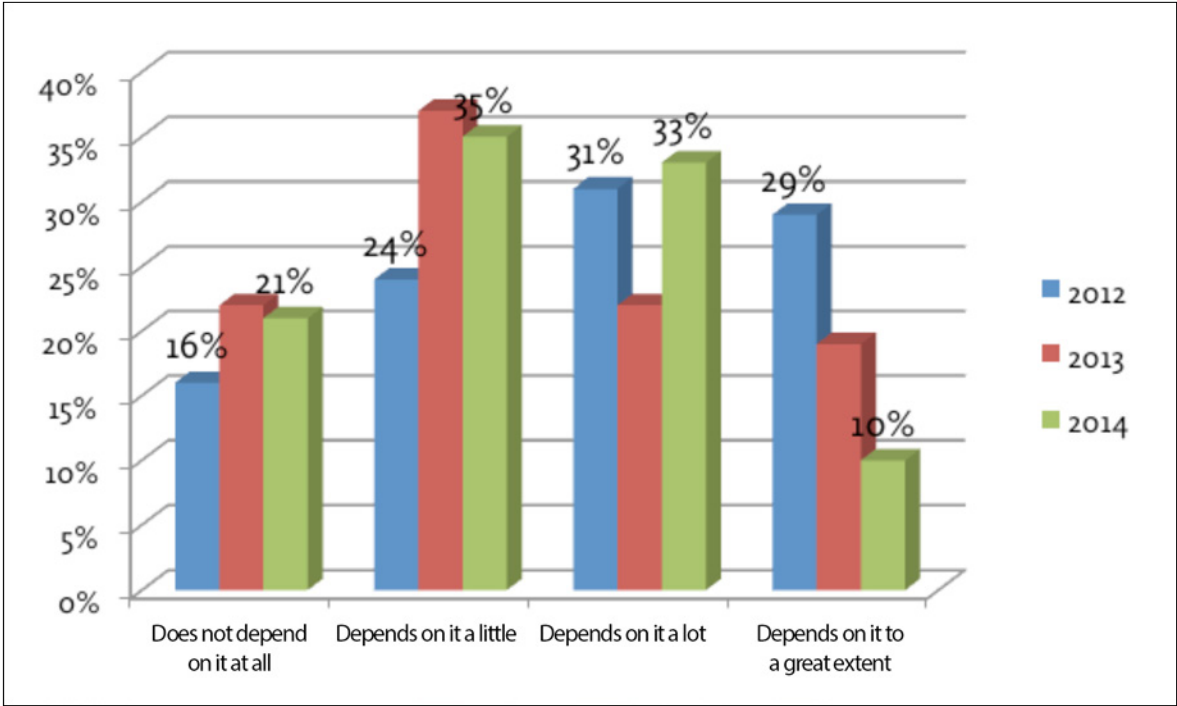


It is worth juxtaposing the answers concerning resistance with the answers to the question concerning the sources of pressure. When we wanted to know who conveys pressure to journalists, there was only a 2% difference in the proportions of answers indicating owners and editors, respectively. When it came to resistance, however, the share of responses indicating owners and editors, respectively, were 7% apart. It is also interesting to note how large the share of non-responses was on this particular question, since almost a quarter of the sample did not respond to the question whether they had resisted pressure by editors or owners.

4.2. Media managers

It appears that the trend is that an ever diminishing share of media managers feels that there is substantial political or business pressure on the media.

↘ *To what extent does the financial viability of your workplace depend on politics?*



In 2012 there were more respondents who felt that the financial viability of their workplace depends on politics than in 2013. Between 2013 and 2014, there was little movement in this respect, however. Yet there is a decreasing trend; back in 2012 political dependence was still seen as significant, but by 2013 this had changed.

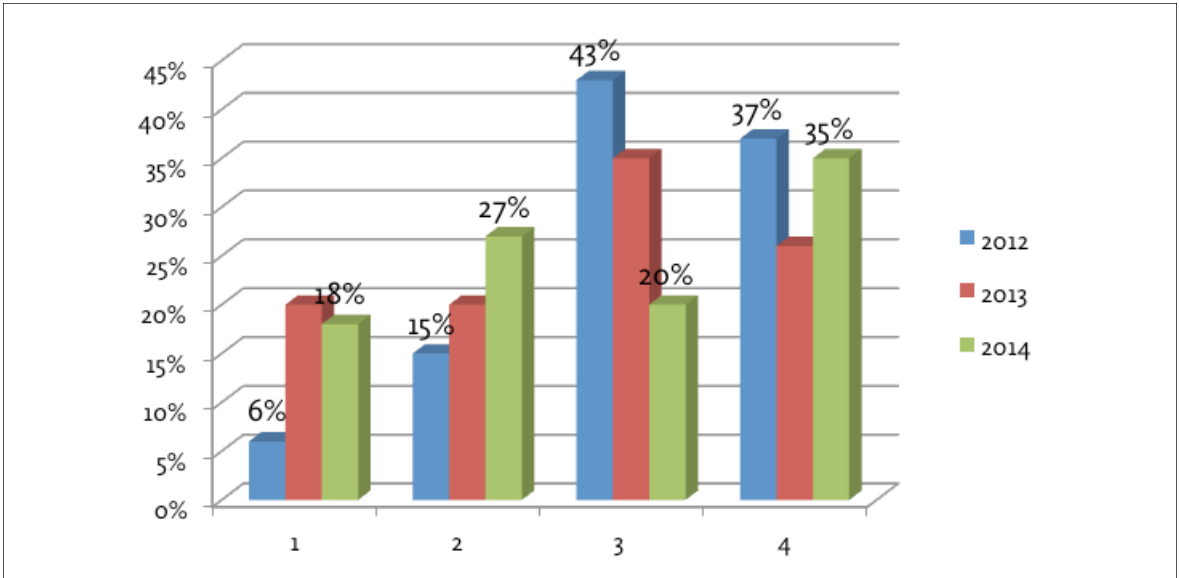
The ratio of those who assessed that the financial situation of their workplace only depends on politics to a minor extent rose from 24% in 2012 to 35% in 2014, while the share of those who saw this dependence as very significant dropped from 29% to 10%. We do not know the reasons behind the changes going on between 2012 and 2013, but the size and composition of the sample might serve as part of the explanation. Few media managers were willing to respond to our questions, and media managers who work for media outlets that take more critical stances refused to respond.

It is also conceivable, however, that ownership changes in the media market play a role in these results.²

² For more details on the shifts in the Hungarian media market, please read Mérték's relevant analyses: Ágnes Urbán: Állami reklámköltés 2008-2012 [State advertising spending, 2008-2012], <http://mertek.eu/jelentesek/allami-reklamkoltes-2008-2012>

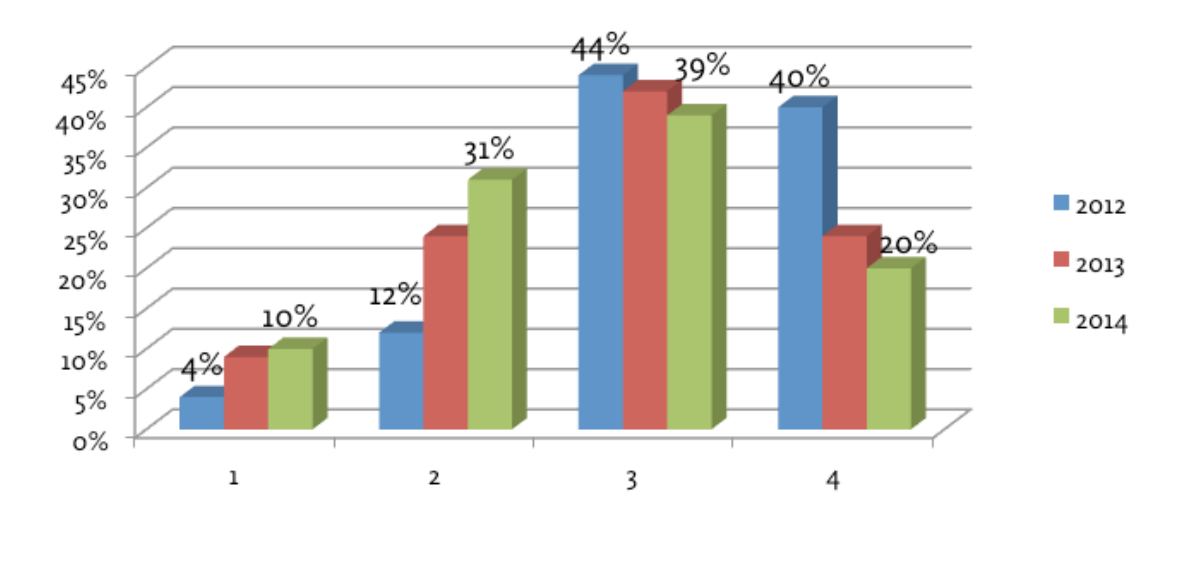
Krisztina Nagy: Mária országa – a Médiatanács újírja a rádiós piacot [The land of Maria - the Media Council is in the process of rewriting the media market], <http://mertek.eu/jelentesek/maria-orszaga-a-mediatanacs-ujirja-a-radios-piacot>

↓ *How strong is the political pressure on the Hungarian media in your opinion?*
 (A value of 1 indicates that there is no pressure, while a 4 indicates that the prevailing pressure is strong enough to curtail press freedom in Hungary)



There are no obvious changes in the degree of political pressure. Though there was a rise in the share of those who indicated there was no political pressure (from 6% to 18%) or that it was minor in scope (15% to 27%), at the same time there was also a surge since 2013 in the proportion of those who assess that the prevailing level of political pressure threatens press freedom, with the result that the ratio of this particular opinion returned to the values it started from in 2012. In the case of the value “3” there was a significant decline, however. While back in 2012 43% of media managers had perceived some political pressure on the media, by 2014 this ratio had declined to 20%. The full picture potentially becomes more nuanced when we aggregate all responses submitting scores of either a 3 or a 4, that is if we look at all those who think there is some level of political pressure on the media; in this case we observe that their share was 80% in 2012 and only 55% in 2014.

↓ *How strong is the business pressure on the Hungarian media in your opinion?*
 (A value of 1 indicates that there is no pressure, while a 4 indicates that the prevailing pressure is strong enough to curtail press freedom in Hungary)



A growing share of managers submitted that the level of business pressure is minor, and there is a substantially diminishing share of respondents - at 20% fewer than half as many as in 2012 - who believe that this pressure is massive enough to threaten press freedom. It is important to note, however, that on the whole over half the sample, 59%, indicated that there is growing business pressure on the media (the sum of answers indicating a score of 3 or 4).

4.2.1. Instruments of pressure

Just as in the 2013 survey, managers once again indicated that the role of most instruments is in decline. The reason is probably the underlying sense that pressure on the whole is perceived to be less prevalent. Surprisingly, the instruments of business pressure (decisions by state and commercial advertisers) are perceived to be waning. This decline can be explained by a commensurate drop in the sensitivity of managers to such pressure; in other words it may well be that while back in 2012 they perceived certain measures as pressure, they do not even notice them anymore. The direct influence of advertisers and the role of media authority decisions, by contrast, has increased. An especially interesting aspect is that according to managers, the direct influence of advertisers over journalists has grown, while journalists themselves perceive the opposite, that is in their view the role of this instrument is the least important and has not changed since 2013.

↓ In your assessment, what role do the following instruments play in terms of pressuring the media? (weighted index: plays no role at all in pressuring the media =-100 points, plays a very important role=+100 points)

	2012	2013	2014
State advertising decisions (withdrawing advertisements on account of critical content, rewarding friendly content)	+52 points	-10 points	-6 points
Commercial advertising decisions (withdrawing advertisements on account of critical content, rewarding friendly content)	+10 points	-33 points	-25 points
Indirect pressure on journalists by politicians through editors and management	+39 points	+9 points	-3 points
the role of various media authority decisions (fines, licences, frequency permits)	+5 points	-24 points	-28 points
direct pressure on journalists by advertisers	-13 points	-33 points	-13 points
The role of various media authority decisions (fines, licences, frequency permits)	+22 points	+2 points	+18 points
Indirect pressure on journalists by advertisers through editors and management	+26 points	+10 points	-4 points

4.2.1. The sources of pressure

Overall, 37% of media managers indicated that they had not been subject to pressure by any of the six sources listed in the questionnaire, with 63% claiming that they had experienced such pressure. Pressure by politicians, direct superiors and owners have the greatest negative impact on respondents' assessment of the state of press freedom. Pressure from advertisers, editors-in-chief and colleagues do not impact respondents' opinions on press freedom, however.

4.2.2. Personal experience

While in 2013 41% of media managers experienced political pressure in the course of their work, by 2014 this ratio had risen to 45%. Though the difference is not huge, it contradicts the trend of declining political pressure. It is conceivable that respondents' sensitivity has changed since 2012.

Those who have personally experienced political pressure tend to have a worse sense of press freedom than the average. The average press freedom score stands at 5 points among those who have made personal acquaintance with political pressure, while for the entire sample it is 6.8. In 2013, the correlation was even more pronounced: Those who had experienced pressure gave a score of 4.7, while the score among all respondents was 7.3. Opinions about press freedom have therefore slightly deteriorated since 2013 among those who did not experience political pressure, while those who experienced such pressure have a better overall assessment of press freedom.

Political pressure is mostly aimed at concealing certain issues. Among respondents, 20% had encountered this in their work. The second most important form was pressure to emphasise names: 16% of respondents indicated that they had encountered this. Covering a given issue improperly or inadequately was the third most frequent objective of pressure.

This picture becomes more nuanced still when we consider that managers see the prevailing levels of resistance against political and economic pressure as decidedly low. In response to the question asking Have you ever experienced that a journalist at the media outlet where you work refused an instruction by the editor/editor-in-chief to conceal/distort some political/economic fact?, 6% answered "yes" in 2014. And in response to the question asking Have you ever experienced that a journalist at the media outlet where you work refused an instruction by the owner to conceal/distort some political/economic fact? a mere 2% said yes.

4.3. General public

In the general public's assessment, political pressure on the media has increased since 2013, albeit only slightly. Reviewing the distribution of answers over the past three years, we observe see that the share of those who perceive strong political pressure (a value of 3) has risen from 33% to 39%. The two extreme values (1 and 4), have both returned to their 2012 levels.

↓ *The degree of pressure from political parties*
(A value of 1 indicates that there is no pressure, while a 4 indicates that the prevailing pressure is strong enough to curtail press freedom in Hungary)

	2012	2013	2014
1	3%	5%	2%
2	9%	10%	10%
3	33%	36%	39%
4	44%	41%	44%
Don't know	10%	7%	5%

Looking at party preferences as well, we observe that while 30% of Fidesz voters think there is massive political pressure on the media, among MSZP voters this indicator stands at 54%. Yet opinions tend to converge somewhat when we look instead at how many Fidesz and MSZP voters, respectively, gave political pressure exerted by parties a score of at least 3; in this case we see that three-quarters (77%) of Fidesz voters also agree that there is such a pressure, while among MSZP voters this proportion stands at 89%. Seen from this angle, party preferences no longer play such a great role in terms explaining the distribution of opinions given the fact that 83% of the general public gave the degree of political pressure on the media a score of at least 3. It seems that there is some inconsistency in public perceptions: While they see

that there is substantial political pressure on the media, they also have an overall positive assessment of the way the media works, at least in some respects (see Section 3.3).

↓ *The level of pressure from advertisers*
(A value of 1 means there is no pressure, a value of 4 indicates that pressure is massive enough to curtail press freedom)

	2013.	2014.
1	6%	5%
2	21%	21%
3	34%	41%
4	29%	26%
Don't know	9%	7%

The general public views the changes in the degree of pressure from advertisers and politics similarly. The share of those who believe that there is strong pressure (a score of 3) has risen from 34% to 41% since 2013.

4.4. Comparing opinions

Journalists unequivocally perceive the prevailing levels of pressure on the media as the highest among the three groups interviewed. Among journalists, the share of those who believe that the level of political pressure is minor has declined from 17% to 4% over the past three years, while the proportion of those who believe it is massive enough to curtail press freedom has risen from 33% to 52%. The managers who responded have a slightly different assessment, for in this group there has been a rise from 6% to 18% since 2012 in the proportion of those who perceive no political pressure whatsoever, while concomitantly the ratio of those who feel that political pressure is substantial has dropped from 43% to 20%. Nevertheless, 35% of media managers still see political pressure on the media as very strong. Unlike the perceptions of journalists and media managers, the views of the general public have shifted only slightly. But party preferences, which are otherwise potent explanatory variables when it comes to shifts in the public's views, only play a minor role in explaining changing perceptions with regard to this particular issue.

5. MEDIA REGULATIONS

The ways in which the media and press freedom work, and how these fluctuate over time, is obviously also influenced by the legal framework, and correspondingly we asked all three groups to share their opinions on the subjects.

5.1. Journalists

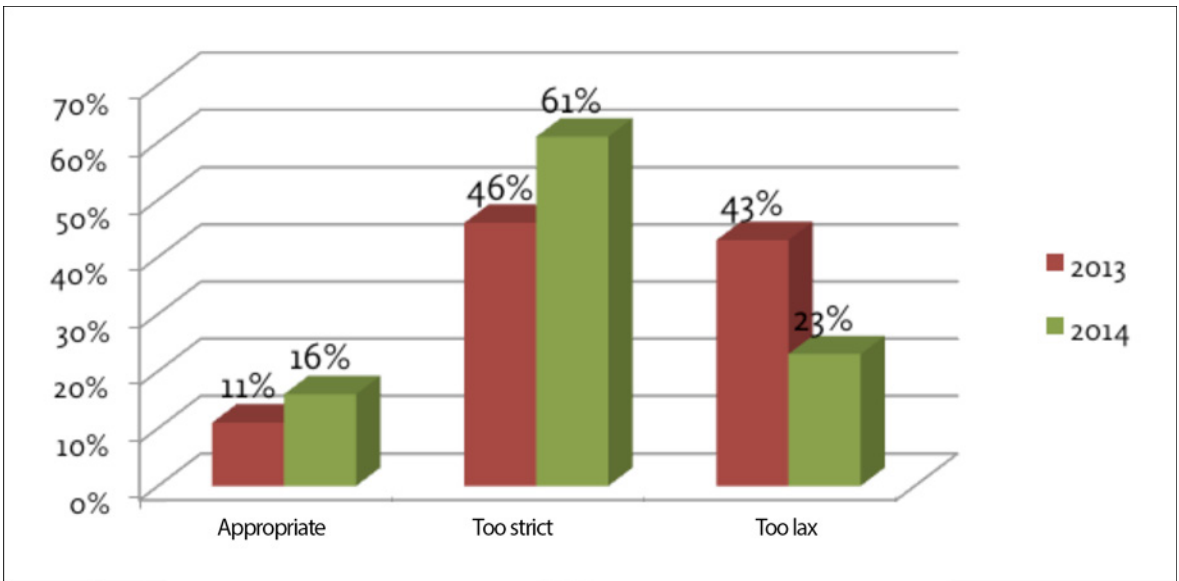
An overwhelming majority of journalists, 80%, assess that the prevailing media regulations are too severe. In other words their assessment of the regulations has remained essentially unchanged since 2013, when this ratio stood also at 80%. The share of those who thought that the regulations are too lax continues to be insignificant. The way respondents assess the regulations correlates with their overall perception of press freedom. Those who believe that the regulatory system is adequate have a far better than above average perception of press freedom with a score of 6.5. The majority who think the regulations are too strict offered an assessment that was lower than the sample average, with a mean score of 3.8.

The impact of media regulations on the work of journalists seems rather stable, as over the past 3 years the ratio of those who believe their work is influenced by regulations has been hovering around 50% all throughout, while the percentage of those who believe that media regulations have a substantial impact on their work has fluctuated between 12%-15%. Those who assessed that media regulations have no impact on their work as journalists made up roughly 30% of the sample.

5.2. Media managers

For some reason, media managers' opinions about media regulations have changed massively in the past two years. The ratio of those who believe the regulations are too strict has surged from 46% to 61%, while the percentage of those who felt it was too lax has dropped 20%. It seems that a rising proportion of media managers is dissatisfied with the legal regulation of the world of media.

↘ *How do media managers assess current media regulations*



Just as in the case of journalists, opinions about legal regulations correlate with perceptions of the state of press freedom. Managers who are more critical of the state of press freedom also tend to believe that Hungarian media are excessively regulated. It is also worth noting, however, that in this case the term

“more critical” is a relative one, since those who believe that Hungarian media are excessively regulated gave the prevailing state of press freedom an average score of 5.3 - slightly better than the median value.

5.3. General public

The distribution of popular opinions only began to shift in 2013; the ratio of those who believe that the regulations are overly strict has declined from 42% to 39%, while the share of those who think it is too lax has risen from 13% to 18%. As compared to the 2013 data, however, the difference between the assessments of supporters of the governing party and those who back the opposition party MSZP has actually declined. Last year, 29% of Fidesz voters declared that the regulations were too strict, while 61% of MSZP voters held the same. It appears that party influence has less of an impact on the way respondents assess the regulations than it did in 2013.

↓ *What is your assessment of the current media regulations? (2014)*

	Fidesz	MSZP
Adequate	36%	22%
Too strict	34%	52%
Too lax	19%	16%

5.4. Comparing options

Since 2013, the opinions of managers and journalists have converged somewhat, due to changes in the views of managers. A vast majority (80%) of journalists still holds that the regulations are too strict, while among managers this ratio has surged from 46% to 61%.

Perceptions of the media regulations correlate significantly with respondents’ assessment of press freedom. In the case of both journalists and managers, those who think that the existing regulations are too strict tend to have a worse assessment of the state of press freedom, while those who believe the regulations are adequate are more likely to have a good assessment of press freedom.

6. MEDIA PLURALISM

In response to the question whether there are any concealed phenomena in the Hungarian media, at least two-thirds of all respondents assessed that these exist. An interesting phenomenon is that the ratio of those who submitted that not all topics are covered in the media has been declining every year in the case of all three groups - though only slightly. In the general public, this decline has been 9% since 2012, among managers it was 6%, while among journalists only 4% fewer respondents assessed that there are concealed phenomena in the domestic media.

↓ *Do you believe that all issues are covered commensurately with their real importance in the Hungarian media?*

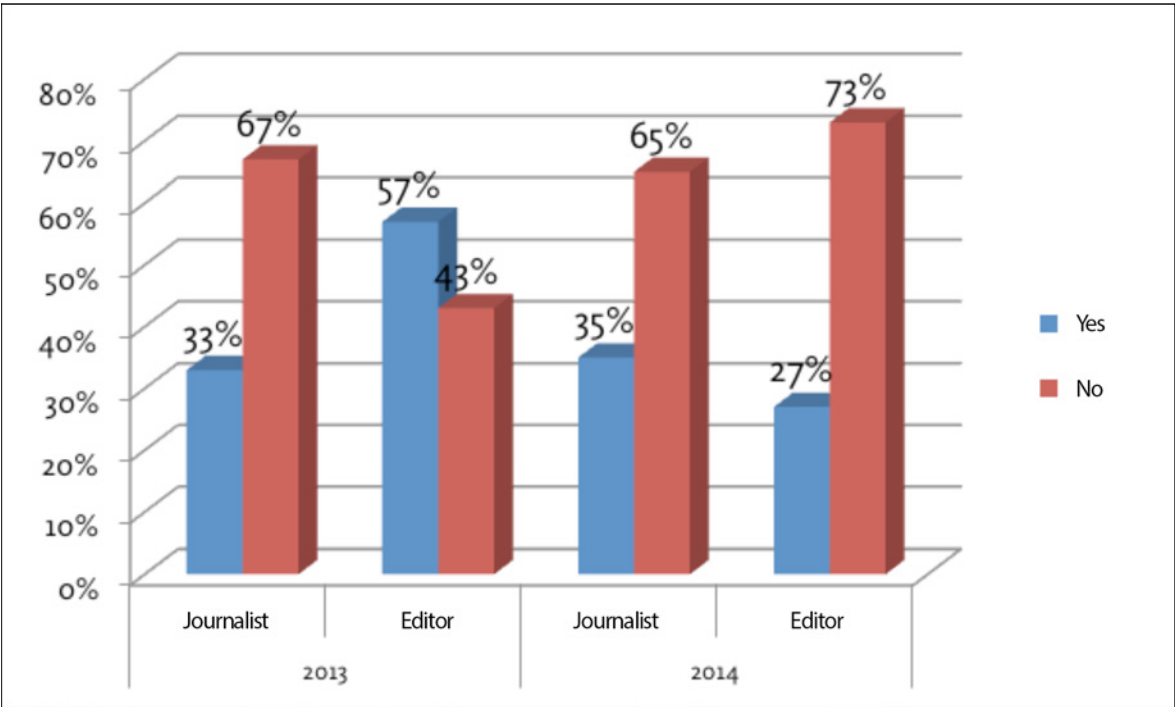
	Journalists			General public			Managers		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
No, there are concealed phenomena.	77%	75%	72%	80%	75%	71%	96%	97%	90%
Yes, a majority of media tend to cover all issues adequately.	6%	5%	4%	13%	17%	21%	4%	3%	8%
No answer	17%	20%	24%	7%	8%	8%	-	-	2%

7. JOURNALISM AS A PROFESSION

7.1. Self-censorship

In 2012, 22% of responding journalists submitted that they had concealed or distorted political or economic facts in the course of their work in the interest of avoiding adverse consequences. In 2013, this ratio rose to 34% and in 2014 it fell back again to 21%. The graph below shows that the fluctuation in the share of those who resorted to self-censorship may have stemmed from the actions of editors. In the period under investigation, the percentage of editors who engaged in self-censorship fell from 57% to 27%.

↓ in the performance of your professional duties, have you ever concealed or distorted and political/economic facts in the interest of averting adverse consequences?



The relationship between respondents’ assessment of press freedom and their personal experience with self-censorship is less pronounced than previously. In 2013, those who had not engaged in self-censorship had a far better view of the state of press freedom than the average respondent. By 2014, this difference had diminished; those who had not personally engaged in self-censorship had an only slightly better impression of the state of press freedom than those who had not engaged in self-censorship.

	Average Press Freedom Index score according to those	
	2013	2014
who have engaged in self-censorship ...	3,7	3,7
who have not engaged in self-censorship...	4,8	4,3
Average	4,3	4,1

7.2. Attitudes towards professionalism, love of profession

While in 2013 the opinions of responding journalists concerning ethical and professional issues were very uniform, in 2014 this had apparently changed. On three of the four statements we proposed, answers were divided by a ratio 75%-25%, which is a significant shift as compared to the previous 90%-10% division. It is readily apparent that journalists' opinions are most divided when the journalistic conduct in question can lead to business or financial damages, the loss of advertising revenue or competitive disadvantage. It appears that for roughly a third of respondents' existential fears are concerns that override the desire to follow proper journalistic conduct.

↓ *Is it right for*

	Journalists		Managers	
	Yes	No	Yes	No
an editor-in-chief to publish an investigative piece on a politician despite the owners' express wishes? As a result of the article, the paper loses significant advertising income and four persons on the staff have to be let go.	72%	28%	41%	59%
for a journalist to interview the newspaper's owner for the newspaper and accept the precondition that he/she may only ask about previously agreed upon topics, thus leaving out uncomfortable questions about corruption charges against the owner?	7%	93%	33%	67%
a journalist to refuse to attend a press conference out of solidarity with a colleague who was banned from the event, even though the most important competitor of his/her paper relays exclusive information from the same event?	72%	28%	22%	78%
for an editor-in-chief to launch a campaign at the owner's behest against an economic policy by the government that will have a negative impact on the publisher, and for weeks to put only articles on the cover page that discuss the deleterious effects of this policy?	23%	77%	18%	82%

A majority of media managers thinks that journalists are wrong when and if their solidarity with colleagues outweighs the financial interests of their own media outlets, and they condemn editors-in-chief who publish articles despite objections by the owners of their media outlet. Two-thirds of managers disagree with the notion that all questions put to owners must be pre-approved.

Managers' views seem to suggest that they do not agree with the fundamental tenets of the profession and of professional ethics. For managers, the interests of the owners and of media market competition override the rules of professional ethics.

In one interesting respect, 2013 and 2014 data completely coincide with one another: In both years 57% of journalists indicated that they would not be pleased if their children pursued the same profession. The correlation between self-censorship and the love of one's profession has grown, however, as 72% of those who have engaged in self-censorship would prefer if their children did not choose this profession. In 2013, this ratio had stood at 63%.

Such negative experiences also correlate with respondents' views about press freedom: those who would be pleased with their children also becoming journalists gave the state of press freedom a higher than average score of 4.9, while those who said no only gave a score of 3.6.

Among media managers, too, the sense of how press freedom currently fares correlates highly with respect for the profession of journalism. While a majority of journalists consider that press freedom is not doing well in Hungary, and 57% would not be happy if their child would follow in their footsteps, among managers the opposite holds: They have a more favourable view of the state of press freedom, and 53% would be happy if their children were to become journalists.

Among journalists, 18% have accepted minor gifts in exchange for a report or coverage, 22% accepted invitations of minor value (e.g. to a restaurant), while 1% accepted payments. When it comes to their views of colleagues, the proportions change: 32% know about colleagues accepting minor presents, 36% know about colleagues accepting minor invitations and 14% know about payments.

Though regarding our own mistakes as less grievous than those of others (e.g. colleagues) is a typical human trait, it is still surprising that there is a 13% gap between those who claim to have accepted money

themselves and those who assess that their colleagues have done so. The 14% in the share of those who have accepted money is exceedingly high, even if this is only the perception of respondents.

