

Update of the complaint in the case of state advertising spending in Hungary

The Hungarian media system radically changed at the end of November, 2018. The private owners of 476 government-friendly media outlets¹ “donated” their entire asset to a foundation, called Central European Press and Media Foundation (KESMA). It is led by Orbán ally media expert Gabor Liskay and includes current and former members of the ruling Fidesz party on its board.

On December 5, Prime Minister Viktor Orbán signed a decree declaring the merger to be an event of strategic national importance that serves “the public interest of saving print media” and exempting it therefore from all possible national scrutiny of the Competition Authority, and by extension of the Media Council.

Mission of the foundation is to “promote activities that serve value creation and strengthen Hungarian national identity in the print, radio television and online media platforms that make up Hungarian mass communication.” In fact the goal of the foundation by the further increasing the media concentration was to improve the economic efficiency of pro-government media empire. Surprisingly two big pro-government media companies, TV2 commercial television with national availability and Radio 1 network (almost with national coverage) stayed out of this merger. Both of them were owned by government commissioner Andrew G. Vajna. In January 2019 Vajna unexpectedly died, so future of Radio1 and TV2 is uncertain at the moment. It is rather possible that they will join to KESMA in the future.

On top of that, KESMA started its international expansion, since V4 News Agency (V4NA) was created. The Hungary-based New Wave Media Group Kft. owns 57 percent of the company; Danube Business Consulting owns 40 percent, while ambassador Szalay-Bobrovniczky still owns 3 percent. New Wave Media Group is part of KESMA, while Danube Business Consulting is owned by Arpad Habony, who is the well-known spin-doctor of Viktor Orban.

V4 News Agency, or V4NA, was registered in London with 50 journalists to present events from the perspective of the so-called Visegrad Four group of Eastern European countries including Hungary, Slovakia, Czech Republic and Poland, according to its website. It publishes in English and Hungarian and plans to add other languages later.

‘We give a conservative, right-wing perspective of the key political, economical and other news that are critical to our life in Europe and around the world,’- says V4NA on its website². This news agency clearly channels Viktor Orban’s views on international level. His views are

¹ Bátorfy, A. (2018): Data visualization: this is how the pro-government media empire is owning 476 outlets was performed <https://english.atlatszo.hu/2018/11/30/data-visualization-this-is-how-the-pro-government-media-empire-owning-476-outlets-was-formed/>

² <https://v4na.com/en/v4na-news-from-the-v4-by-the-v4>

expanding to a wider European stage after building a domestic hegemony and branching out to the Balkans.

Many of the portal's initial offerings follow the themes of Orban's anti-immigration and anti-Soros rhetoric, with headlines such as "Migrant kills wife after she converts to Christianity," "Germany's dual migration problem" or 'Macron welcomes Soros in the presidential palace'. There are also entertainment sections, like Fashion, Sports, Culture. Stories are currently behind a paywall, with no prices listed.

One of the highlights is an interview with Hungarian Foreign Minister Peter Szijjarto. Orban-friendly Hungarian news website Origo cited V4NA on Monday, calling it an "international news agency," as having found a link between the European People's Party and George Soros, the billionaire financier who's a favorite foil for the anti-immigration rhetoric of the government in Budapest. The EPP recently suspended the membership of Orban's Fidesz party.³

Print media

Role of print media in political information has diminished in the last years, almost all print products suffered from circulation decline. Only the regional newspapers can reach a broad base of readers and all of these are part of KESMA.

In the past the two major and traditional political dailies, left-wing Népszabadság and conservative Magyar Nemzet⁴ were closed in 2016 and 2018 respectively, so the whole political newspaper segment lost the majority of the readers.

Tabloids are much more popular and two of them are part of KESMA. The only free newspaper, Lokál is also a KESMA product.

Segment of political weeklies is rather colourful, there are government critical products. It is surprising that Szabad Föld, traditional left-wing political weekly, targeting readers in rural areas became also part of KESMA.

Table 1: Print media companies in news/political segment (2018)

<i>Newspaper(s)</i>	<i>Publisher</i>	<i>Net turnover from sales 2018 ('000 HUF)*</i>	<i>Type of owner (at the end of 2018)</i>	<i>Circulation 2018 H1**</i>
12 regional newspapers, Világgazdaság, Nemzeti Sport, magazines	Mediaworks Hungary Inc.	27 715 172	KESMA	206 662 (regional newspapers)

³ Gergely, A. (2019): Orban Propaganda Machine Seeks Wider Reach With News Agency. <https://www.bloomberg.com/news/articles/2019-04-09/orban-propaganda-machine-seeks-european-reach-with-news-agency>

⁴ Magyar Nemzet was resurrected in February 2019, but with a completely different ownership structure and new journalist staff coming from Magyar Idők daily, which was closed at the same time.

Bors, 2 regional newspapers	Lapcom Inc.	10 155 018	KESMA	80 693 (regional newspapers) 53 226 (Bors)
3 regional newspapers	Inform Média Lapkiadó Ltd.	3 950 697	KESMA	102 484 (regional newspapers)
Magyar Idők (daily)	Magyar Idők Kiadó Ltd.	1 699 639	KESMA	n.a.
Ripost (tabloid)	Ripost Média Ltd.	2 536 049	KESMA	n.a.
Figyelő (weekly)	K4A Lapkiadó Ltd.	971 896	KESMA	n.a.
Szabad Föld (weekly)	Mezőgazda Lap- és Könyvkiadó Ltd.	1 476 411	KESMA	60 048
Lokál (free newspaper)	Modern Media Group Inc.	2 683 912	KESMA	n.a.
Lokál extra (free weekly)				
Magyar Hírlap (newspaper)	Magyar Hírlap Ltd.	770 247	Hungarian investor (pro-government)	n.a.
Magyar Demokrata (weekly)	Artamondo Ltd.	565 800	Hungarian investor (pro-government)	10 855
Blikk (tabloid)	Blikk Ltd.	5 933 110	Foreign investor (independent from government)	91 732
168 óra (weekly)***	Telegráf Kiadó Ltd.	291 438 (2017)	Foreign investor (independent from government)	10 598
Népszava (daily)	XXI. század Média Ltd.	1 842 166 (incl Vasárnapi Hírek)	Hungarian investor (independent from government)	20 742
HVG (weekly)	HVG Kiadó Inc.	3 714 775	Hungarian investor (independent from government)	30 869
Magyar Narancs (weekly)	Magyarnarancs.hu Ltd.	233 745	Hungarian investor (independent from government)	n.a.
Élet és Irodalom (weekly)	Irodalom Ltd.	199 724	Hungarian investor (independent from government)	n.a.
Hetek (weekly)	Hetek.hu Ltd.	151 050	Hungarian investor (independent from government)	n.a.
Magyar Hang (weekly)	Alhambra Press Bt	70 652	Hungarian investor (independent from government)	n.a.

* Source: Annual financial accounts (<http://e-beszamolo.im.gov.hu/oldal/kezdolap>)

** Source: matesz.hu

*** 2018 annual financial report is not available

Pro-government media outlets are bolded

The table does not include publishers that do not have a presence in the market for political/public affairs media, but the data on turnover also includes those consumer magazines (e.g. women’s magazines, home décor magazines) that are part of some major publisher’s portfolio (e.g. Mediaworks). The total turnover of the 18 publishers analysed here was 65 billion HUF (ca. 210 million EUR) in 2018.

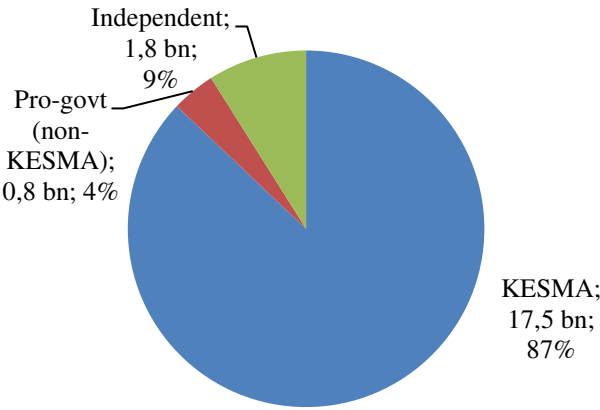
Table 2: Summary of print media market in news/political segment (2018)

Type of the owner	Number of publishers	2018 turnover ('000 HUF)	Share from overall turnover (%)
KESMA	8	51 188 794	78,8%
Hungarian investor (pro-government)	2	1 336 047	2,1%
Foreign investor	2	6 224 548	9,6%
Hungarian investor	6	6 212 112	9,6%

The KESMA and other publishers that are identifiably held by pro-government publishers received 80.9% of the 2018 turnover.

It is also illustrative, if we analyze the state advertising spending in the print media sector.⁵ The majority of the state advertising went to KESMA-companies.⁶

Figure 1: State advertising revenues in print media at list prices (2018)



Source: The authors’ own work based on data provided by Kantar Media

⁵ This analysis was compiled on the basis of the Kantar Média database, which contains so-called list price advertising spending. This calculates advertising spending based on publicly available lists prices and actual advertising volumes sold. The specific amounts that we thus estimate do not provide a perfectly accurate picture of reality, for media companies tend to offer steep discounts from their list prices. The database does not extend to every media outlet, which is something that needs to be kept in mind and must be accepted as a given.

⁶ Only those media brands are included in the calculation which have any kind of political and public affairs content (political dailies, weeklies, tabloids, regional newspapers). Hobby magazines and other thematic publications are excluded.

The state advertising spending is highly concentrated in the political segment of the print media. Altogether 87% of the state money went to those brands which became part of KESMA portfolio at the end of 2018. Other 4% of the state spending went to an other pro-government brand Magyar Hírlap. Only the remaining 9% of state advertising was spent at those media outlets which are independent from the Fidesz.

Radio market

In the case of radio market the dominant position of KESMA cannot be proved based on the 2018 data. Right wing Retro Radio is part of the KESMA portfolio and it is in monopolistic position in the national commercial radio segment, but it was launched only in 2018. Previously the Radio 1 network was the biggest commercial player and its owner, Andrew G. Vajna, government commissioner was able to keep out his radio of KESMA. After the death of Vajna the future of Radio 1 is highly uncertain, in 2019 the state advertisings disappear from Radio 1 network.

Table 3: Major radio stations in news/political segment (2018)

Radio station	Broadcaster	Net turnover from sales 2018('000 HUF)*	Type of owner	Reach ('000) October-December 2018
Radio 1	Radio Plus Ltd.	2 097 045	Hungarian investor (pro-government)	989
Retro Radio	Hold Reklám Ltd.	424 118	KESMA	1 382
Karc FM	Karc FM Média Ltd.	360 676	KESMA	n.a
Info Radio	Inforádió Ltd.	549 612	Hungarian investor (independent from government)	56
Klub Radio	Klubrádió Inc.	74 192	Hungarian investor (independent from government)	n.a

* Source: Annual financial accounts (<http://e-beszamolo.im.gov.hu/oldal/kezdolap>)

The data on net turnover does not include other revenues (subsidies, donations)

** Source:

http://nmhh.hu/dokumentum/201067/NMHH_negyedves_ttekint_201810201812_IA_v02_orzgos_fin.pdf

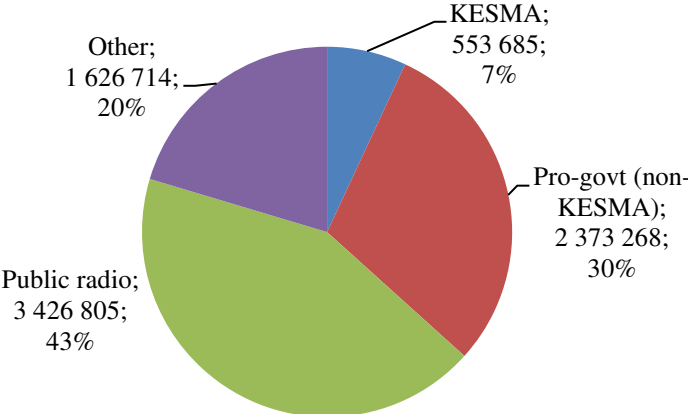
The table includes data for the radio stations with the widest audience reach (Radio 1, Retro) as well as for three major political talk radios (Karc, Info, Klub).

This table does not include public service radios because the public media’s budget is not transparent and hence there is no way to determine how much money their stations receive for their operations. Kossuth Radio, which focuses on politics and public affairs, reaches a million listeners a day.

Pro-government Retro Radio began broadcasting nationally in 2018, hence its turnover data for 2018 is relatively low. **As a result, the share of KESMA-owned stations among the radios in this list is merely 22,4%, but if we widen the net to include non-KESMA held government-friendly media outlets, then thanks to the high turnover of Rádió1 the total pro-government portfolio in this market segment received 82.2% of the total 2018 turnover (again: not considering the openly pro-government public media).**

Concerning the state advertising money, in 2018 only 37% of the radio spending went to KESMA or other pro-government radios stations. It is important to mention again, it was a transitional year because of the launch of the national Retro Radio.

Figure 2: State advertising revenues in radio market at list prices (2018)



Source: The authors’ own work based on data provided by Kantar Media

In the case radio market, role of public broadcaster is significant, since the public radios are rather popular. Although it is not financed by commercial revenues, but it can decrease the revenues of the independent radios. As a result, independent radio stations have only 20% share from state advertising. (Only the biggest radios are included in the Kantar database.)

Public broadcaster has a special role in the radio market as a news service provider. It produces entire news blocks for commercial radios at a low price. Given that news services take up a significant portion of the production costs in radio, many commercial radios availed themselves of this opportunity and now broadcast news blocks produced by the public broadcaster. In practice, this means that the news blocks are recorded at hourly intervals at the MTVA and are then sent out to all contractual partners. Thus, the radios involved do not need to hire their own

news editors. As a result, the various local radios broadcast the same news block throughout the day, thereby granting space to government propaganda.

Television market

Based only on revenue data the television market seems to be rather healthy, since the RTL commercial television is owned by professional foreign investor. In fact, RTL has to balance the other pro-government channels, since the public and private channels strictly follow the communication of the Fidesz.

Table 4: Television stations in news/political segment (2018)

Channel	Broadcaster	Net turnover from sales 2018 ('000 HUF)*	Type of owner	2018 audience share(4+)**
RTL Klub	Magyar RTL Televízió Inc	32 768 373	Foreign investor (independent from government)	10,09%
TV2	TV2 Média Csoport Ltd.	39 101 320	Hungarian investor (pro-government)	10,21%
ATV	ATV Inc.	2 396 674	Hungarian investor (independent from government)	2,94%
Hír TV	HírTV Inc.	2 316 436	KESMA	1,43%
Echo	Echo Hungária TV Inc	4 954 242	KESMA	0,66%
Euronews	Euronews SA	n.a	Foreign investor (independent from government)	n.a

* Source: Annual financial accounts (<http://e-beszamolo.im.gov.hu/oldal/kezdolap>)

** Newsletter of Nielsen Közönségmérés Ltd.

The table includes data on those commercial television channels with major audience reach (RTL Klub, TV2) that broadcast daily evening news shows, along with the three major political/public affairs television channels (ATV, HírTV, Echo).

This table does not include public service media television channels because the public service media's budget is not transparent and the data available do not clearly reveal how much money the channels actually receive to fund their operations.

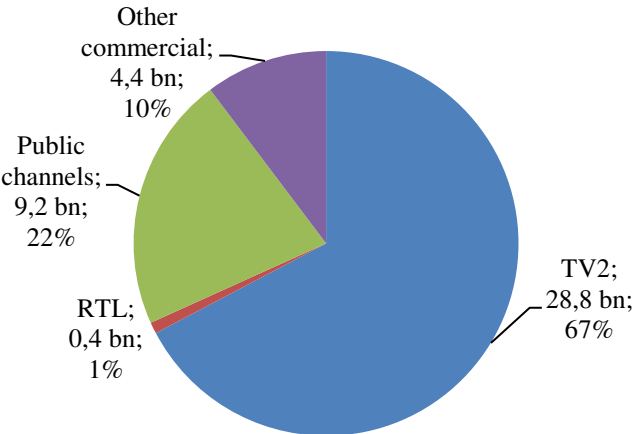
The share of KESMA channels is 8.9%, while the share of KESMA + pro-government channels is 56.9% based on 2018 turnover in this segment. This relatively balanced state of affairs in the television market owes to the strong position of market leader RTL Klub, which is foreign-owned.

As of 1 April 2019, the Echo TV was closed, but its staff is working at HírTV. Probably there was an economic reason behind the decision that KESMA did not want to run two similar television channels. Hír TV is a strong brand among conservative and right-wing audience, but

the Echo staff fitted better to the KESMA portfolio. So, it resulted the special situation, where Echo TV was closed, but HírTV employees were fired.

The state advertising spending in the television market is highly imbalanced. The independent RTL channels can hardly gain state advertising revenues, but the TV2 company owned by Andrew G. Vajna is heavily financed by such source. However, as mentioned previously future ownership of TV2 is a question after the death of Vajna.

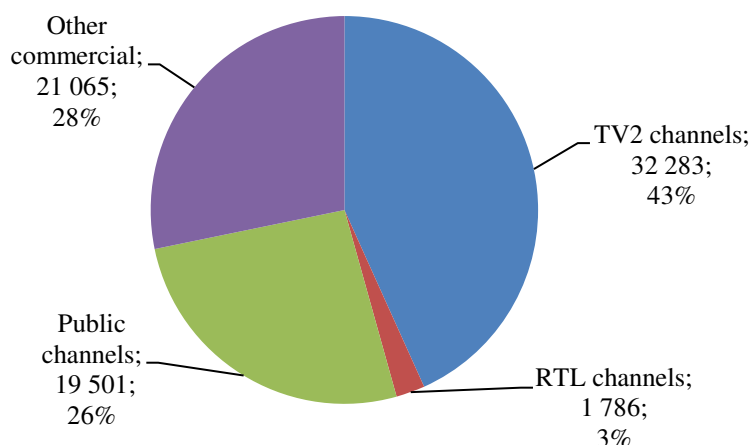
Figure 3: State advertising revenues in television market at list prices (2018)



Source: The authors' own work based on data provided by Kantar Media

In the case of television market the list prices are not realistic, broadcasters give significant discounts to the advertisers. It gives a more realistic picture if we calculate the number of seconds advertised by the state advertisers.

Figure 4: State advertising in television market in seconds (2018)



Source: The authors' own work based on data provided by Kantar Media

The position of TV2 is still very strong especially if we compare to its direct competitor, RTL. The market distortion effect of the state advertising spending is clear on the example of TV2 and RTL. TV2 owned by pro-government investor has been continuously financed by state advertising for years, the very same state advertisers avoid the foreign-owned RTL. Ownership is not the only difference between the two channels: TV2 is part of the Fidesz propaganda in their news making, while RTL is balanced in the editorial practice.

Kantar database does not include data for news channels like the relatively independent ATV, pro-government Hír TV and Echo, so their state advertising analysis is not possible.

Online market

The list of online media outlets online includes the four largest online news portals. However, it does not include data on media outlets whose data we have included elsewhere in the analysis (HVG – hvg.hu). Another limitation of the scope of our analysis here is the fact that some major pro-government outlets (e.g. 888.hu) do not participate in the Gemius measurement, which is accepted as a market standard, and hence we do not know how many visitors they have.

Table 5: Major portals in news/political segment (2018)

Portal	Content provider	Net turnover from sales 2018 ('000 HUF)*	Type of owner	Real User (November 2018)**
24.hu	Central Digitális Média Ltd.	4 072 866	Hungarian investor (independent from government)	2 936 165

origo.hu	New Wave Media Group Ltd.	4 145 674	KESMA	2 859 437
index.hu	Index.hu Inc.	1 303 864	Hungarian investor (independent from government)	2 584 657
444.hu	Magyar Jeti Inc.	510 365	Hungarian investor (independent from government)	1 721 226

* Source: Annual financial accounts (<http://e-beszamolo.im.gov.hu/oldal/kezdolap>)

**Source: Gemius (<http://dkt.hu/hu/menu/ola.html>)

The online segment is the most independent segment of the Hungarian media space. Among the major online newspapers, Origo is the only one that is part of KESMA. **KESMA received 41.3% of the four companies' aggregate turnover, even though based on the number of unique visitors, the only KESMA held outlets in this group, Origo, is not the leading player in the market (although its market position is very strong).**

State advertising spending database does not give a clear picture in the case of online market. The database contains the sales houses, not the news portals and the sales houses typically have larger portfolio.

Summary and aggregate revenue data

Above we have examined the major media companies that have a presence in the political/public affairs market. Our compilation did not include smaller music stations even though those, too, feature news every hour, nor did we look at smaller online newspapers that focus on public affairs.

The aggregate data below presents the share of pro-government companies in the market overall based on 2018 turnover data.

Table 6: Summary of news/political segment (2018)

Market segments (number of companies)	Total turnover	KESMA	KESMA + pro-govt	KESMA	KESMA + pro-govt
		billion HUF		Share	
Print (18)	65,0	51,2	52,5	78,8%	80,9%
Radio (5)	3,5	0,8	2,9	22,4%	82,2%
Television (5)	81,6	7,3	46,4	8,9%	56,9%
Online (4)	10,0	4,1	4,1	41,3%	41,3%
Total	160,0	63,4	105,9	39,6%	66,2%

The KESMA companies received 39,6% of the total turnover of the private media publishers analysed here, and if we broaden the scope to include the entire pro-government portfolio, that figure rises to 66,2%.

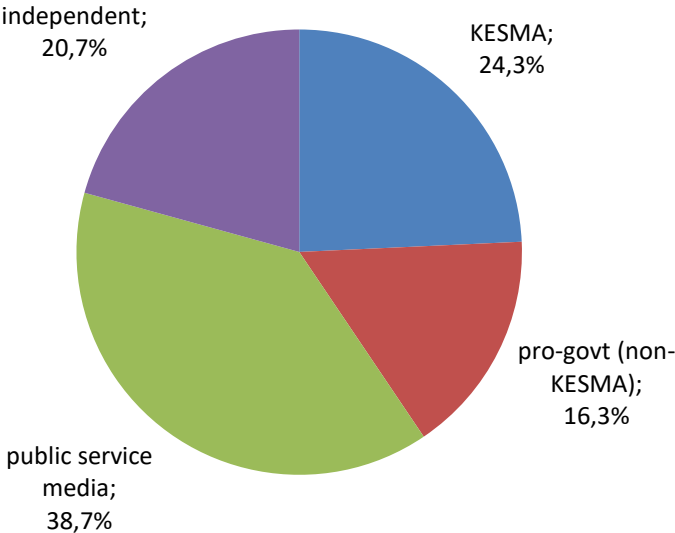
It is reasonable to include the public service media portfolio in the political/public affairs market, although it is not a market financed company, as it belongs to the news media market.

Table 7: Summary of news/political segment including public service media (2018)

Total turnover (private+public)	KESMA	KESMA + pro- govt	KESMA+ pro-govt+ public	KESMA	KESMA + pro- govt	KESMA+ pro-govt+ public
billion HUF				share		
261,2	63,4	105,9	207,1	24,3%	40,6%	79,3%

If we add the 2018 year budget of the public media (101,2 billion HUF) to the market of private companies (160,0 billion HUF), the proportions are even worse. **Altogether 79,3% of the political/public affairs market is financed by sources decided by the ruling party.**

Figure 5: Shares of political information market after the creation of KESMA (based on 2018 turnover data)



Source: own figure based on data from corporate financial reports (<http://e-beszamolo.im.gov.hu/oldal/kezdolap>)

In the print and online markets, most pro-government media brands were subsumed into the KESMA. Two major pro-government brands outside KESMA remain in the radio and

television markets, namely Radio 1 and TV2. Despite the fact that they are readily identifiable as being staunchly pro-government in their coverage, they are legally still independent. The major question is how the passing of their owner, the government commission Andrew G. Vajna, in January 2019 will impact the fate of these companies. It is possible that they, too, could be incorporated in the KESMA soon.

Of course, it is clear that dominant position cannot be calculated *de iure* in such way in competition policy. However it is also clear that these companies *de facto* act alike and providing exactly the same kind of news and information. They follow the communication of the ruling parties and at the same time they are critical with other political actors. It does not mean purely critical attitude, which is part of journalism, but it is often character assassination and spreading fake news.⁷ The actions of these media outlets prove the *de facto* dominant position. In fact, such a position seriously undermines media freedom and through that the democracy not only in Hungary but in the EU as well.

There is one segment of media, where actually dominant position of KESMA can be proven: the print media: KESMA with its 78% share of the ownership of print media is clearly exceeding the limit where its dominant position can be stated. Even if we were to prove the abuse of such position in the Hungarian market, we do not have the means to provide you with data on how such abuse affects trade between Member States. The Commission is much more equipped for such an investigation. Anyway, it is important to analyze the whole media ecosystem, incl. printing services. Noteworthy Magyar Hang, a government critical political weekly launched recently (2018) is printed in Slovakia, since there were not available printing facilities in Hungary for a government critical weekly.

Therefore, we encourage the Commission to examine the situation carefully. We also encourage the Commission to analyse such concentration and the existing situation from the point of view of the rule of law.

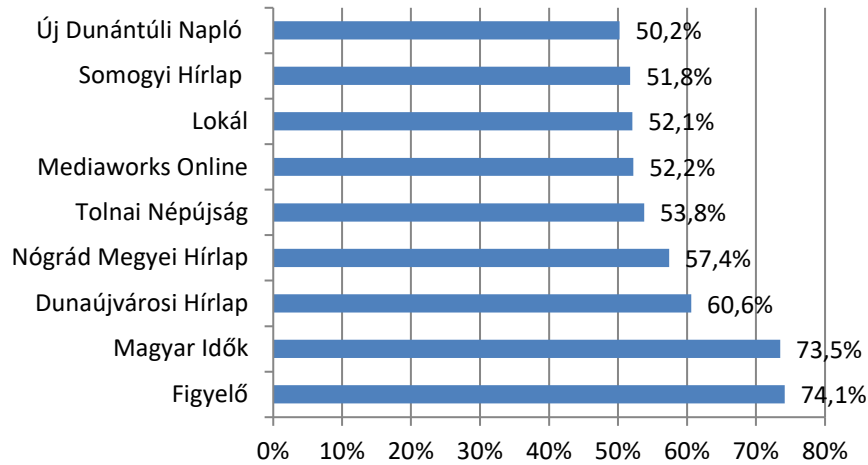
Biggest beneficiaries of state advertising

It worth to examine some KESMA brands to what extent they are beneficiaries of state advertising spending.⁸ We can also learn a lot from investigating where the share of state advertising as a proportion of total advertising revenue is high; this will show us which media brands would not be able to attract sufficient advertising from the market and are thus financially dependent on the state.

⁷ There were 109 court cases against pro-government media outlets in 2018. Detailed data are available in Erdélyi, K. (2019): Pro-government propaganda outlets lost dozens of defamation cases in court last year. <https://english.atlatszo.hu/2019/02/07/pro-government-propaganda-outlets-lost-dozens-of-defamation-cases-in-court-last-year/>

⁸ State advertising data visualization is available for 2006-2018: <https://mertek.atlatszo.hu/allamihirdetesek/>

Figure 6: KESMA brands with the highest level of exposure to state advertising spending, i.e. the highest proportion of state advertising as a share of total advertising revenue (2018)

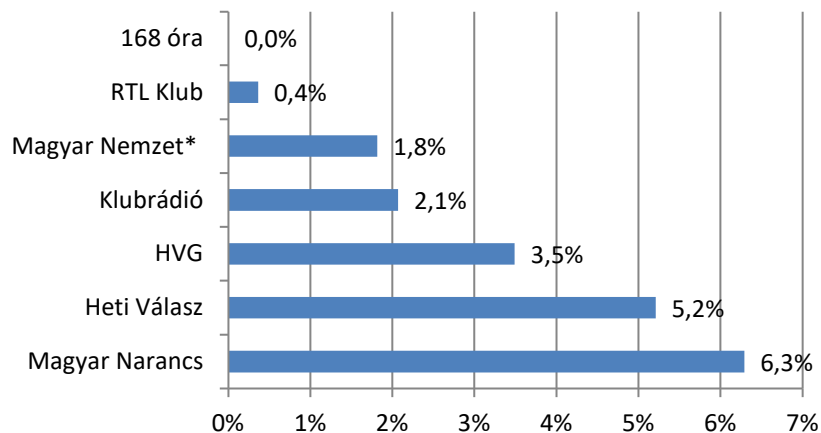


Source: The authors' own work based on data provided by Kantar Media

All of the listed brands are part of the KESMA, most of them are print brands (2 national newspapers, 5 regional newspapers, 1 weekly, 1 online). In all cases more than 50% of advertising revenues is coming from the state.

As a comparison there is a similar calculation for some independent media brands:

Figure 7: Proportion of state advertising as a share of total advertising revenue in the case of some independent brands (2018)



*Magyar Nemzet was closed in April 2018, the owner did not want to finance the losses. It was relaunched in 2019 as a government propaganda newspaper (part of the KESMA)

Source: The authors' own work based on data provided by Kantar Media

In the case of independent brands the share of state advertising is much lower, only a few percent. The major independent political weeklies (Magyar Narancs, Heti Válasz, HVG, 168 óra) can hardly get any state advertising. It worth to compare to the pro-government political weekly Figyelő which gained 71,1% of the total advertising revenues from the state (*Figure 5*). Klub radio is a popular government-critical talk radio available in region of Budapest, traditionally more right-wing daily Magyar Nemzet was also government critical in 2018, until it was closed and reopened again in the heart of KESMA. RTL Klub had high audience share, but it was not appealing enough for state advertisers.

These figures illustrate how state advertisers favour government-friendly companies and thereby seriously distort market competition. It stands to reason that the decisions of commercial advertisers are more likely to reflect market logic because they have a business incentive to effectively reach their target groups. A state advertiser may of course target different groups and pursue another advertising strategy than a commercial company, but when the advertising strategies of state advertisers consistently and spectacularly diverge from those of commercial advertisers, then the issue is probably not one of specialised target group formation. There is reason to assume that in the case of state advertisers, the guiding principle is not effectiveness but some other, political consideration.

Media conglomerate on the rise across borders

Creation of V4NA was not the only step of the Fidesz-related media to the international market.

Orban's illiberal rule has relied heavily on an increasingly centralized propaganda machine based in Budapest. But even after acquiring the majority of the Hungarian media landscape Orban has been unable to control international news coverage, which has been far more critical of him than domestic media. Therefore, news outlets channeling Orban's views have started an expansion to a wider European stage after building a domestic hegemony and branching out to the Balkans.

His close allies have also influenced elections in countries in the former Yugoslavia after buying up outlets in Slovenia and Macedonia.

In Slovenia individuals connected to Fidesz invested into media outlets affiliated with their political ally, the conservative Slovenian Democratic Party: three Hungarian media firms now own nearly 88 % in NOVA24TV.si, an outlet that serves as a mouthpiece for SDP.

In Macedonia Hungarians with close links to the country's pro-government media acquired controlling stakes in firms that own more than half a dozen local outlets which have a long history of supporting the former ruling conservative VMRO-DPMNE party. They also have a

history of spreading provocative and sometimes fabricated news stories targeting opposition and civil society groups.

Arpad Habony, spin-doctor of Viktor Orban was also a main figure in the Balkan expansion.⁹

The expansion in Balkan and the launch of the previously mentioned V4NA news agency represent an effort by Orban to expand its regional influence. Creation of the media background can help the populist allies and it can also improve international news coverage for the Orban-government.

Budapest, June 25, 2019

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Member of the European Parliament

Ágnes Urbán
Mérték Médiaelemző Műhely Közhasznú Nonprofit Kft

⁹ Jovanovska, M. – Bodoky, T. – Belford, A.(2018):Right-Wing Hungarian Media Moves Into the Balkans.
<https://www.occrp.org/en/spooksandspin/right-wing-hungarian-media-moves-into-the-balkans>