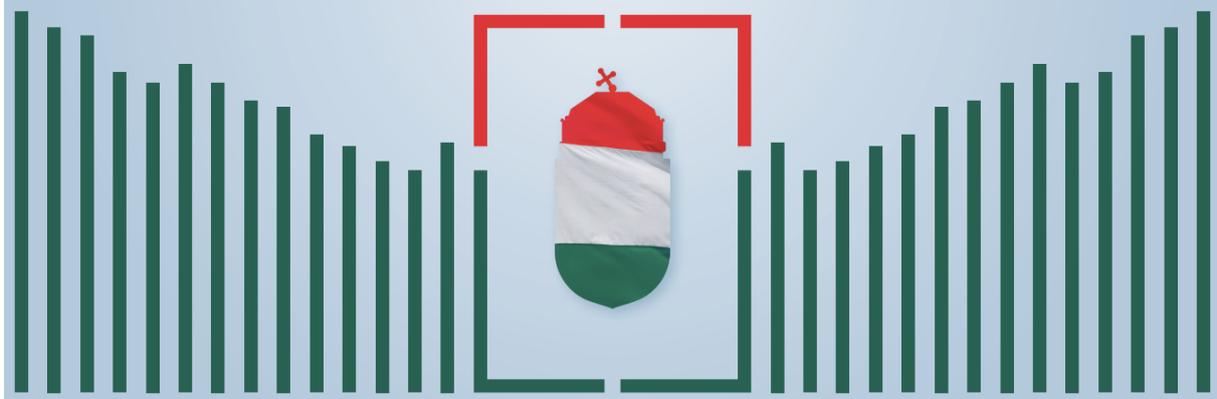




RATE YOUR STATE

HOW DO HUNGARIANS SEE THE PRESENT
AND FUTURE OF PUBLIC SERVICES?



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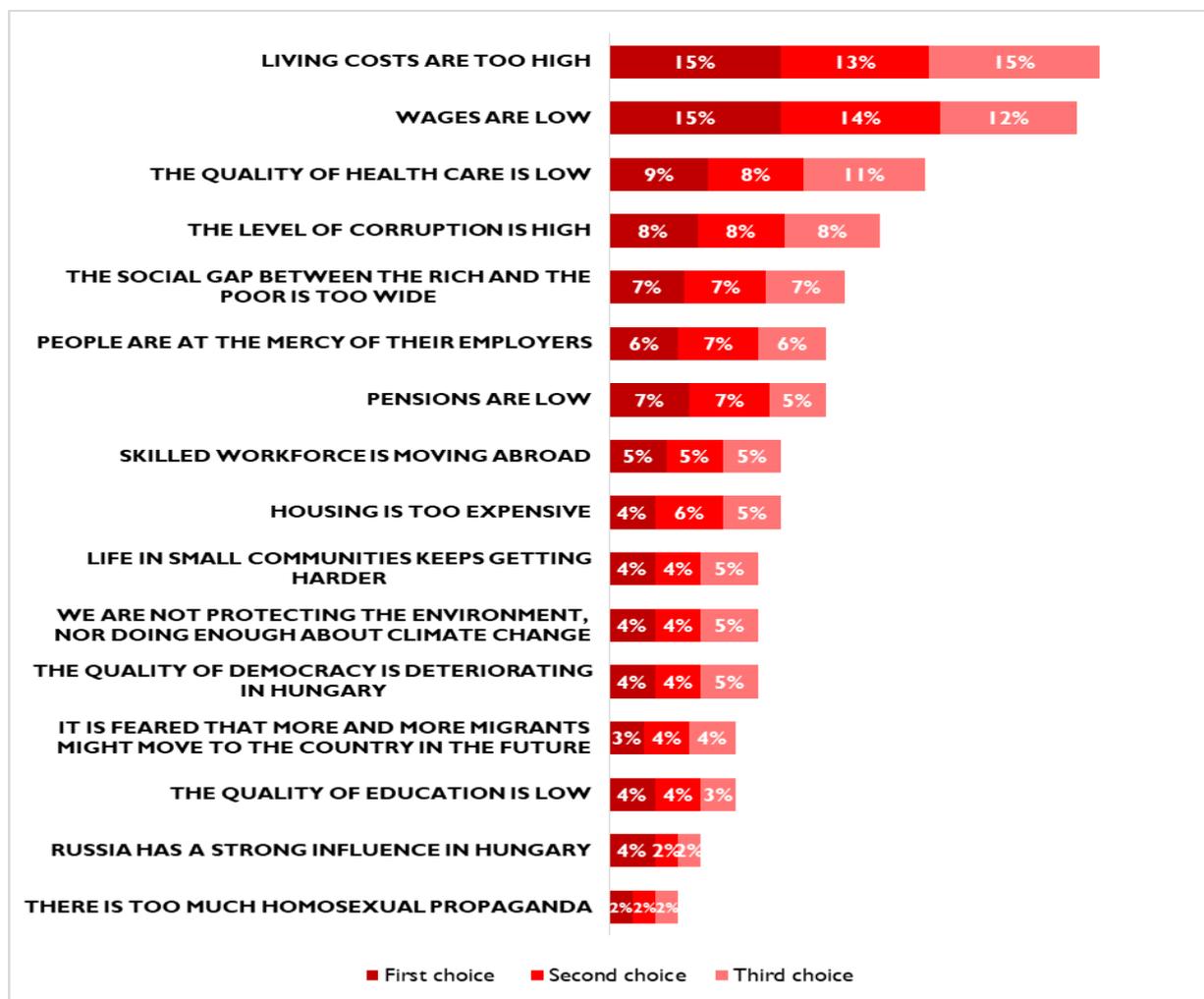
This research explores how Hungarians perceive the quality of public services, and what changes they have experienced during the 12 years of the Orbán governments. We take a detailed look at what Hungarians consider to be the most pressing problems and the most popular policies in two areas that have been a constant focus of public debate in Hungary for decades: health and education.

We used a survey conducted with the help of our partner, Závecz Research, between 14 and 22 September 2022 as the basis for our analysis. The survey was based on personal interviews with 1,000 Hungarians who made up a representative sample of Hungarian society based on age, gender, educational attainment and the type of municipality they live in.

Mapping the Hungarian public’s perception of the most pressing issues in autumn 2022: cost-of-living concerns and healthcare top the list, Russian influence and LGBTQ issues are at the bottom

The first four places on the Hungarians' problem list have not changed over the past year (Graph I). In autumn 2022, high costs of living were the most cited problem (43%), followed by low wages (41%). The low quality of health care ranked third (28%). One year on, corruption is still the fourth most important problem for Hungarians (24%).

Graph I. Which three do you consider to be the biggest problems in Hungary?



Economic and social problems also ranked in the next three places, which shows that Hungarians still expect political actors to address mainly problems related to cost of living. A fifth of Hungarians cited the inequalities between rich and poor (21%), vulnerability to employers (19%) and low pensions (19%). High social inequality was ranked sixth a year ago (fifth in the current survey), while vulnerability to employers has jumped from ninth to sixth place.



Only a tenth of respondents (11%) consider migration to be one of the three most important problems. There have been many demonstrations in recent months about the quality of education, but only as many people cite the quality of education as the country's most pressing problem as migration. Since the outbreak of the Russian-Ukrainian war, the issue of Russian influence has been particularly high in the public discourse, yet only 8% of Hungarians think it is one of the three biggest problems. The last, 16th place, is occupied by the constant theme of government communication, "homosexual propaganda", which only 6% of Hungarians consider to be one of the three most important problems.

Both Fidesz and opposition voters identify the same issues as Hungary's most important problems

Among both government and opposition voters, the high cost of living, low wages and the low quality of healthcare are the three most frequently cited problems. However, there are a number of differences between voters on the two political sides. While the level of corruption is the fourth most serious problem in Hungary according to opposition voters (31%), it is only the eleventh most worrying problem for pro-government respondents (16%). There is also a significant difference regarding the quality of democracy: a fifth of opposition voters (19%) think it is one of the three biggest problems, putting it in sixth place, while only a tenth of pro-government respondents (10%) feel the same way (putting it in fourteenth place).

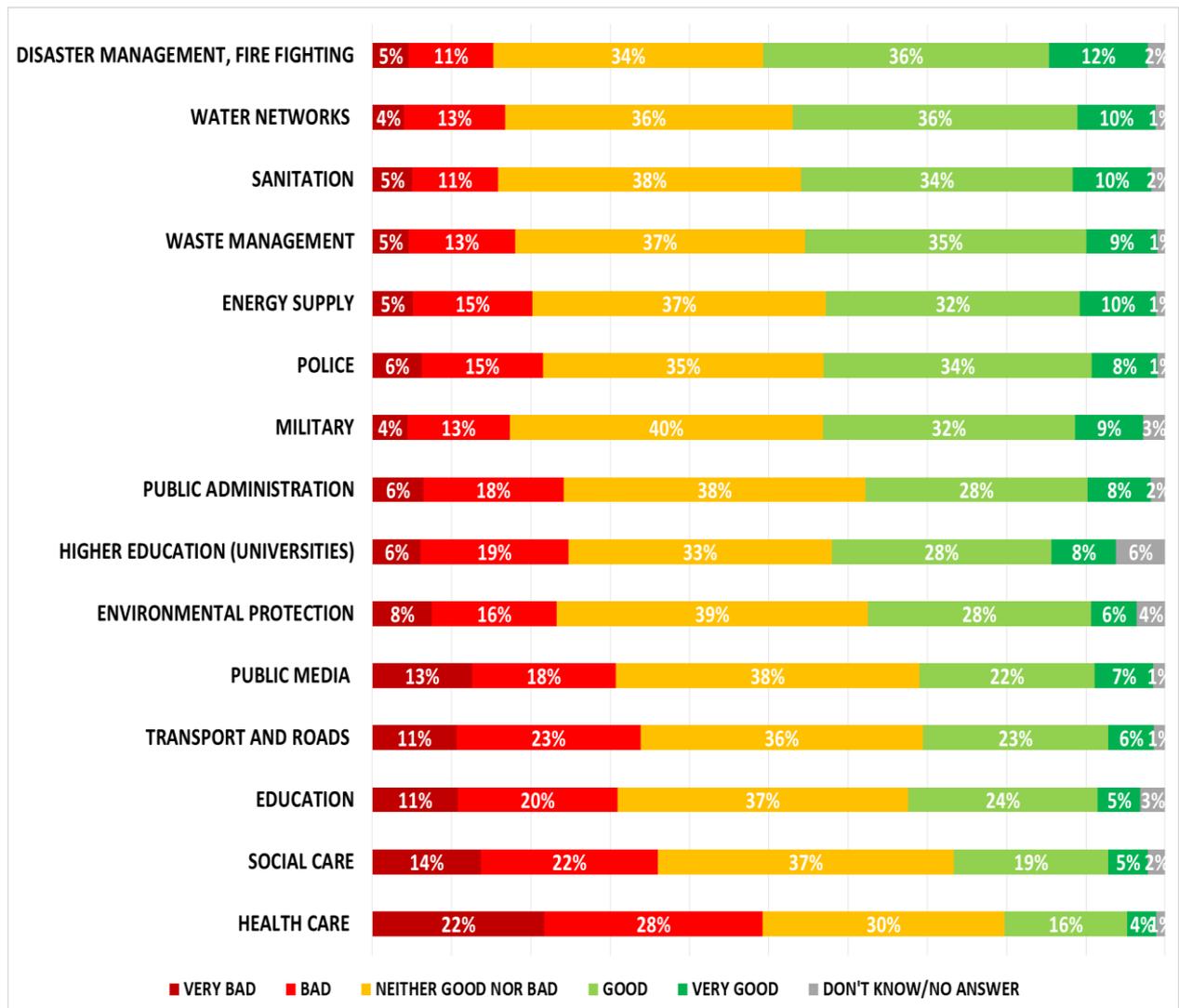
Migration is ranked eleventh for the Fidesz voters (16%), while for the opposition it is the penultimate (fifteenth) (6%). The scare about "homosexual propaganda" is noticeably below the level of importance of the other issues: it is the last (3%) among opposition voters and the second to last among Fidesz voters (8% of government supporters rank it among the three most important issues). Russian influence is the least important issue (7%) for government supporters of all the topics surveyed.

According to Hungarians, the highest quality public services are disaster management, fire fighting, water supply, sanitation and waste management

Most people have a good opinion of the functioning of the disaster management and fire fighting: 48% are satisfied with them and only 16% are not (Graph 2). This is followed by some key areas of basic service infrastructures: 46% of Hungarians are satisfied with water supply and the operation of the water network, while 44% are satisfied with the quality of sanitation, as well as waste collection and management. The proportion of those with a positive opinion of the energy service (42%) is just below this figure. Those who have a good opinion of the functioning of law enforcement are also in the relative majority: 42% are satisfied with the police, and 41% with the military forces. In all of the above cases, the proportion of those who gave a "neither good nor bad" rating is 34-40%.



Graph 2. What is the current quality of public services in Hungary? (% of all those surveyed)



Hungarians have the worst opinion of the quality of public health care

We found five areas where more people have a negative view than a positive view. A relative majority (31%) are dissatisfied with the current quality of public media, a further 38% rate it as "neither good nor bad", and only 29% of Hungarians think there is nothing to complain about the quality of public media. Similar views are expressed on the quality of transport and roads: a third of Hungarians (34%) think the quality of public services in this area is poor, 36% think it is "neither good nor bad", while 29% are satisfied with the current state of transport infrastructure and services.

At the end of our list are education, social care and healthcare. The problems and attempts at reform in all three areas have been on the public agenda for decades, and Hungarians have the worst opinions of them. A third of respondents (31%) rate the current state of public education as low quality, while 37% are neutral and 29% rate it as a well-functioning area.

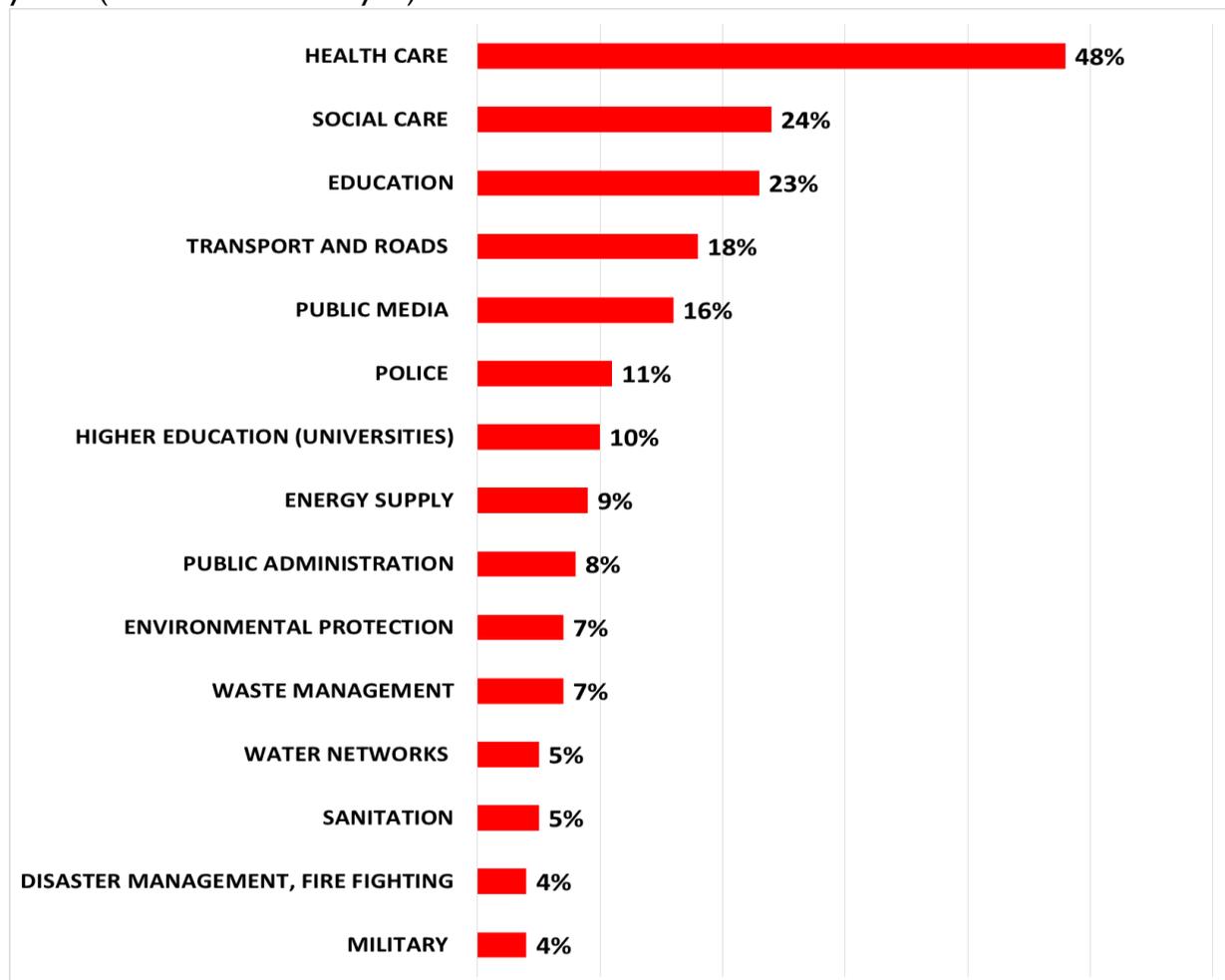


There are even more negative views on the social care system: 36% consider it to be of low quality, 37% are neutral and only one in four Hungarians (24%) think that the social sector is currently functioning satisfactorily. Of the public services surveyed, Hungarians have the worst opinion of the quality of public health care: 50% believe that the health care system is of a poor standard. The proportion of those unsure on this question is 30%, and only one in five (20%) have a good opinion of the functioning of public health.

The quality of health care, social care and education has deteriorated the most under the Orbán governments in the eyes of Hungarians

Hungarians think that the quality of healthcare has by far deteriorated the most, with 48% of Hungarians ranking it among the three areas where quality has declined the most since 2010 (Graph 3). Social care (24%) and public education (23%) came second and third respectively. This was followed by the transport sector (18%) and public media (16%). For the remaining public services, only a tenth or less of Hungarians think that the sector is in the top 3 in terms of deterioration in quality.

Graph 3. Which public services do you think have deteriorated the most over the past 12 years? (% of all those surveyed)





Hungarian citizens with different political preferences have very similar views on the deterioration of public services. Both government (44%) and opposition (54%) voters see the most worrying trends in the area of public health.

Armed forces, police and waste management have improved the most in the last 12 years

In terms of improvements in public services, there are no stand-out results in the responses: in all cases, less than 20% of Hungarians think that the public services in question have improved the most. Military defence comes first, with 18% of Hungarians saying that this is the area where the most marked improvement has been made in the last 12 years. The second and third places are taken by the police (14%) and waste management (14%). The fragmented nature of positive opinions is reflected in the fact that five other areas were also mentioned by more than 10%: disaster management and fire fighting (13%), public administration (13%), water supply (11%), public media (10%), and sanitation (10%). This question also shows that few people see significant improvements in the functioning of social care (6%), public health (6%) and public education (5%) – these three areas are at the bottom of the list.

The most serious problems in education: a shortage of teachers, overburdened and underpaid teachers

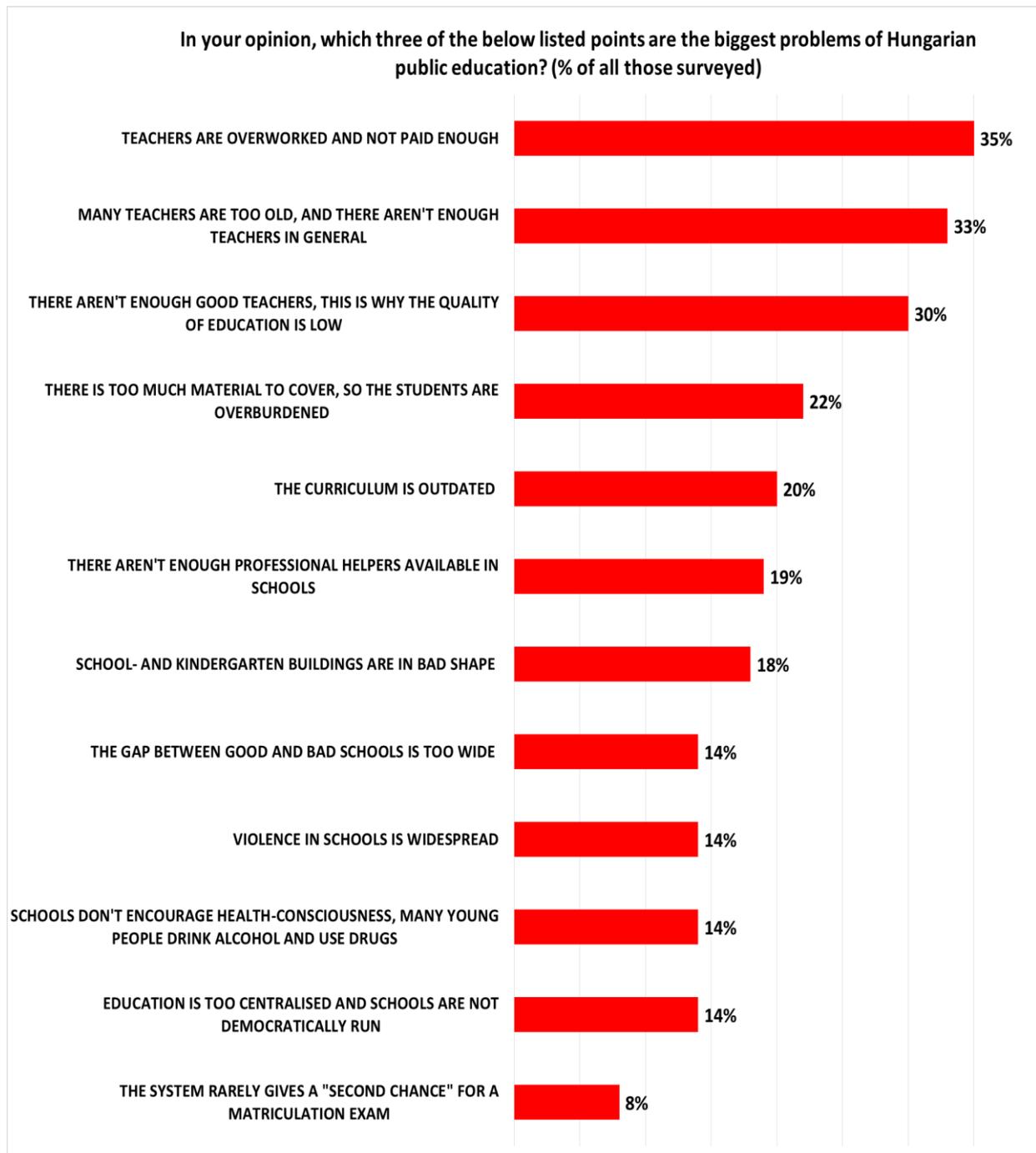
Asked about the main problems facing education, most respondents (34%) said the most pressing problem facing Hungarian public education today is the ageing teaching staff, which is leading to a shortage of teachers in many institutions. 18 per cent believe that the real problem in today's public education is that teachers are overburdened and underpaid – ranking it second. These results suggest that Hungarians believe that the first priority is to reduce teachers' burdens, to increase teachers' salaries and to motivate young people to enter the teaching profession.

As well as being asked to name spontaneously what they think is the most pressing problem facing Hungarian public education, respondents were also given the choice of 12 pre-defined problems (Graph 4). In this question, low teacher salaries came out on top (35%), with almost as many respondents (33%) choosing the shortage of teachers. A third of respondents (30%) think that there are not enough good teachers and that the quality of education is therefore poor. A fifth of Hungarians believe that the main problems in Hungarian public education are the amount of curriculum and overloading of students (22%) and the obsolescence of the curriculum (20%).

No significant differences emerge in the breakdown by party preference. Government, opposition and far-right Our Homeland voters all see an ageing teaching profession and the resulting shortage of teachers, low teacher salaries, and a shortage of good teachers as the three most important problems in public education.



Graph 4. The biggest problems in public education



The most popular education policy proposals: school psychologists in all institutions, free choice of school textbooks, higher salaries for teachers in disadvantaged areas

Four public policy proposals have the greatest consensus. 80% believe that all public schools should have a psychologist available to whom children can turn directly. The possibility for teachers to have a free choice of textbooks is seen by 79% as a reform to be pursued, as is

similar support (78%) for the state to pay higher salaries to teachers in disadvantaged areas. In addition, 77% of respondents would support a pay rise for teachers similar to that for doctors. The return of CEU to Hungary is supported by two thirds (65%) of Hungarians.

The most serious problems in health care: not enough health professionals, long waiting lists, overburdened and underpaid health workers

Based on spontaneous responses, a clear majority (38%) think that the biggest problem to be addressed in the Hungarian healthcare system is the lack of enough healthcare workers (doctors and nurses). In second place, 17% think that waiting lists in hospitals are too long. In all other categories, the percentage of mentions is below 10%. 7% of respondents highlighted that health workers are overworked and underpaid, and that there are significant funding problems in the field because the state does not allocate enough resources to health care.

In addition to the open-ended question, respondents were also asked to choose from a pre-defined list of 10 problems to identify what they consider to be the three biggest problems in public health. Responses to this question confirm the picture that emerged from spontaneous responses: 38% said that one of the three biggest problems is that there are not enough health workers in the system. Also 38 percent of respondents believe that the length of hospital waiting lists is a particularly acute problem. In addition, a significant proportion of respondents (32%) believe that the shortage of good healthcare professionals is behind poor patient care. A third of Hungarians (32%) also ranked overwork and low levels of pay among the three biggest problems.

There is no difference in the top four most pressing problems in the health sector for government voters compared to the population as a whole. The shortage of health workers (39%), the length of waiting lists in hospitals (35%), the overwork and low salaries for health workers (34%) and the shortage of qualified health workers (32%) are the most important problems for Fidesz-KDNP voters.

Opposition voters also say there are not enough health workers (36%), while the physical condition of hospitals is ranked second (this option came only fifth among Fidesz voters). The length of hospital waiting lists (35%) and the overwork and low salaries for health workers (35%) are ranked third by opposition voters.

The most popular health policy proposals: life-saving adrenaline injections in all public education institutions, mobile diagnostic points in disadvantaged municipalities, free vaccinations

83% of respondents believe that the state should provide adrenaline injections in all public education establishments for allergic reactions, which could even save lives. There is also more than 80% support for the provision of mobile screening points for disadvantaged and isolated communities (81%) and for making optional vaccines free (81%).

79% of Hungarians think that social security should also pay for private healthcare in cases where the public health system is unable to provide patients with the necessary diagnosis or treatment within a short time. Also 79 percent support a pay rise for nurses: an overwhelming majority of Hungarians would support a pay rise to at least 60 percent of doctors' salaries in the short term. In addition, three quarters of Hungarians (77%) believe that anyone who wants a real chance of getting well in Hungary today should use private healthcare.

The most popular social measures are proposals to alleviate the burden of the energy crisis

The results show that Hungarian society takes a distinctly left-wing stance on social issues. Welfare measures that are related to the energy crisis and utility costs (such as reducing utility prices, insulation and modernisation of housing, renovation of rental housing) are particularly popular.

In autumn 2022, the most popular measure surveyed was the extension of the energy price freeze scheme until spring 2023, with 85% of respondents agreeing. The same proportion would support the launch of a government programme to build or renovate public and municipal rental housing. This was followed by upgrading the insulation of buildings to reduce overheads, with which 84% of Hungarians could agree. This shows that Hungarians are feeling the symptoms of the energy crisis very strongly and that proposals to alleviate it are particularly well supported.

The support for policy proposals was mostly independent of party preference, but the order of support for individual proposals differed among Fidesz-KDNP and opposition voters. Government party supporters were most in favour of extending the reduction in the overheads, building and renovating municipal and state rental housing, recognising the employment of carers of sick or disabled relatives, and extending the petrol price freeze.

On the opposition side, the most popular policy proposals were measures to protect vulnerable social groups, such as raising the wages of social sector workers, recognising the employment of carers of sick or disabled relatives, banning the switching off of utilities during the heating season, and expanding shelters for the homeless.