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A Weaker Strongman: Orbán's Hungary Before the 2026 Elections

by Johannes Langer

Abstract: The stakes of the 2026 elections go beyond Hungary and are concerning Europe more widely: a government already in long-running conflict with EU rule-of-law standards and partially deprived of structural funds could once again shape the Union's debates on Ukraine, migration and democratic norms. Prime Minister Viktor Orbán enters this campaign weaker than at any point in his 15-year rule, facing for the first time a challenger with Péter Magyar's Tisza party who appears capable to unseat him. This article outlines how his system works, the internal and external pressures it faces now and what Tisza's rise reveals about the difficulty of changing a captured state from a pro-European perspective.

High stakes elections in a captured state

In April 2026, Hungarians will vote in the decisive parliamentary elections that are formally competitive but heavily skewed by captured institutions, controlled media and shrinking civic space. OSCE/ODIHR (2022) observers already judged the 2022 elections to be free but not fair, citing systemic bias in media coverage, campaign finance and the use of state resources.

Hungary's process of changing from democracy to a hybrid regime didn't happen overnight. Orbán's infamous 2014 Băile Tuşnad speech made the direction explicit that "the new state that we are constructing in Hungary is an illiberal state, a non-liberal state" (Hungarian Government, 2014). Since 2010, he has systematically constructed what political scientist

Bálint Magyar (2016) calls a "post-communist mafia state" or disinformation expert Péter Krekó (2022) refers to as an "illiberal informational autocracy". In short, Hungary is described a system where formal democratic institutions are captured to protect informal networks of power and profit.



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Why Orbán remains dominant

Despite growing tensions, the ruling far right-wing party of Orbán, Fidesz, continues to benefit from huge structural advantages, including the control of media, judiciary, economics and election system. First, a pro-government media ecosystem – consolidated in the Central European Press and Media Foundation (KESMA) since 2018 – has been built by Orbán loyalists taking over media outlets, steering state advertising and carrying out well-funded government propaganda campaigns (Sarkadi Nagy, 2024). They have unified narratives that blame “Brussels” (Krekó, 2022, p. 65), migrants and liberal elites for Hungary’s problems while depicting the government as the sole defender of national interests. The little that is left of independent media struggle under economic pressure and regulatory obstacles.

Second, the government has built political control over the justice system step by step since 2010 through constitutional changes, reshaped judicial councils and targeted appointments to key courts and the prosecution service (Transparency International Hungary 2018; 2021). Thus, government loyalists dominate the National Judicial Office and the Constitutional Court, while chief prosecutor Péter Polt has repeatedly declined to pursue corruption cases involving Fidesz-linked businessmen (Ésik, 2022). This has steadily reduced the capacity of courts and watchdogs to check executive power or offer effective remedies against restrictive laws (Hungarian Helsinki Committee et al., 2025). This trend is reflected in the 2025 Rule of Law Report of the European Commission (2025a) which finds Hungary made “no progress” on seven of eight recommendations given in the previous reports (p. 2), with only limited movement on judicial issues.

Third, the oligarchic structure channels public resources to regime loyalists. 13 key businessmen in Orbán’s kleptocracy won EU-funded public contracts worth EUR 19.3 billion between 2011-2023 without competition (Tóth, 2025). The prime example is Lőrinc Mészáros, Orbán’s childhood friend from their village of Felcsút, transformed to Hungary’s richest man with a fortune of USD 3.6bn according to Forbes, thanks to his companies winning 700+ public contracts (Csontos, 2025). 35% of public procurement processes continue to be single-bid procedures, and Transparency International ranks Hungary as the EU’s most corrupt country (Transparency International Hungary, 2023). This can be described as a form of “crony state capitalism” where political loyalty determines who profits: a scheme using EU funds to enrich Orbán’s cronies who in turn support his undertakings (Transparency International Hungary, 2024).



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Finally, the electoral system is used to lock in these institutional advantages. The 2011 electoral law magnified the largest party: single-member districts now decide a majority of seats, “winner compensation” and carefully redrawn boundaries turn modest pluralities into a large seat bonus for Fidesz, enabling repeated constitutional changes (Maskarinec & Charvát, 2022; Scheppele, 2022). Fidesz won almost every rural constituency in 2022, while the opposition was confined to Budapest and other big cities (Forman, 2022). For 2026, rural districts were further re-shaped by gerrymandering to defend Fidesz’s supermajority in parliament. Past experiences suggest that Orbán is ready to further adjust the electoral rules further (even last minute) to favour Fidesz.

Erosion from within: corruption, poverty and broken promises

Despite the institutional capture, the most serious cracks in Orbán’s system have become visible. Surveys show corruption to be among the biggest problems, particularly for supporters of the newly formed Tisza party (Bíró-Nagy et al., 2025). This is not only about oligarchs and high-level scandals: citizens experience corruption in everyday interactions with local authorities and access to services, reinforcing a sense that advancement depends on loyalty rather than merit. Transparency International Hungary’s “Black Book” (2018; 2021) in two volumes on corruption detail the centralised patronage network.

However, economically, the government’s story of stability and gradual convergence is losing credibility, such as few exceptions like the glitz of Budapest’s touristy areas, which are beautiful and where a lot of renovations have happened. Research estimates that roughly 2.5-3 million people (25-33% of the population) can currently be considered poor, while around half of Hungarians live from their monthly income without savings (Friedrich Ebert Stiftung, 2024). The inflation spike of 17% in 2023, the highest in the EU at the time, devastated household budgets (OECD, 2024); inflation remains high with 4.5% in 2025, and purchasing power continues declining (European Commission, 2025b). Younger generation are hit particularly hard as housing prices surged some 15% nationwide (International Investment, 2025); the alternative of renting is not much better as young people in Budapest use 40-60% of their earnings for rent.

Hungary’s education system, once a source of national pride, has declined steadily since 2009 and the latest 2022 PISA results show 15-year-olds below EU averages, whereby it’s the disadvantaged students that cause the performance gap (European Commission, 2025c). Teacher



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salaries are among the EU's lowest and the shortages of teachers have hit disadvantaged schools in rural areas most (OECD, 2025). It is, however, the health sector that has hit Hungarians hardest and showcase an institutional collapse. Between 2010-2019, 8,500 health professionals emigrated looking for better pay and working conditions abroad, giving Hungary one of the EU's lowest doctor-to-inhabitant ratios (Rutai, 2023). "Gratitude payments" to doctors and nurses continue to be widespread despite efforts to stamp them out (Julesz, 2024), and Hungary spends less than half the average health expenditure across the EU average (European Commission, 2023).

Public opinion reflects this breach of trust in their government. In 2024, low wages, high prices and the quality of health care topped the list of perceived national problems, ahead of issues promoted by media outlets such as migration or "LGBT propaganda" (Bíró-Nagy et al., 2024). Opposition voters overwhelmingly report that their financial situation has worsened, but even among Fidesz supporters only a small minority say things have improved; most report stagnation (Bíró-Nagy et al., 2025, pp. 9-10). The implicit social contract of the Orbán years have been built around tolerating illiberal rule in exchange for rising living standards and predictability. This erosion from within creates part of the paradox of Hungary's 2026 elections: widespread dissatisfaction exists alongside resignation as citizens experience the system's failures daily.

Erosion from outside: migration, "peace" rhetoric and rule of law

Externally, Orbán's once potent narratives on migration and the war in Ukraine are also losing traction. For years, the government's hardline stance against refugees and its heavily publicised border fence provided a powerful narrative at home and a model for right-wing populists abroad. Today, however, Hungary faces a growing backlash over the arrival of "guest workers" from outside the EU to fill labour shortages, often in controversial battery and industrial projects (Thorpe, 2024). More than two-thirds of respondents say guest workers depress wages, 60% fear they take jobs from Hungarians and 62% believe the government has betrayed its previous anti-migration stance by allowing them in (Bíró-Nagy et al., 2024). A narrative once deployed against Brussels and "liberal NGOs" now rebounds against the government's own economic strategy.

On Ukraine, Orbán has positioned himself as the champion of "peace" against allegedly war-mongering EU elites, repeatedly framing sanctions and military aid as harmful to Hungarians



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(Viktor Orbán, 2024). Yet years into Russia's invasion of Ukraine, this rhetoric brings diminishing returns. Civic space reports describe a Hungary that is increasingly isolated within the EU and NATO, after repeated vetoes on Ukraine-related measures and rule-of-law dossiers. Domestically, fear of war has fallen behind economic worries, while internationally Hungary is seen as a chronic spoiler whose alignment with Moscow and Beijing undercuts Western unity (European Parliament, 2025). Orbán's non-coordinated visit to meet Putin in Moscow during the Hungarian EU presidency in 2024 is a case in point and his recent visit at the end of November 2025 doesn't help either (Thorpe & Jackson, 2025).

The conflict over rule of law and EU funds crystallises this external erosion. Large sums of cohesion and recovery funding have been frozen or delayed because of concerns over judicial independence, corruption and public procurement as part of the EU's Art. 7 procedure (European Parliament, 2018). Although the European Commission has released some funds after partial reforms, much larger amounts remain conditional, limiting the government's ability to use EU money to sustain growth, finance pre-election giveaways and reward loyal networks. Hungary has lost at least EUR 1 billion of EU funding, and may lose much more for reasons of continued non-compliance (Csaky, 2025).

Orbán has been looking to China and Russia instead, as well as recently to the U.S., but the financial support don't seem to add up as China is handing out loans that will need to be paid back (Subramanian, 2025) and an alleged bailout package, similar to how Trump supported Argentinian president Javier Milei earlier this year, seems unlikely and would come with its own strings attached (Starcevic & Stratford, 2025).

Reverse effects of the cage tightening: foreign agents law, civil society and surveillance

Precisely as these internal and external pressures grow, the Orbán government has built a tighter cage around civic space and political competition. The 2018 "Stop Soros" package criminalising assistance to asylum seekers (The Guardian, 2018), the 2021 anti-LGBTIQ "child protection" law (Venice Commission, 2021) and the 2023 Sovereignty Defence Act together create a toolbox to stigmatise NGOs, academics, churches, journalists and opposition actors as "foreign agents" or threats to national security (Gyori, 2023). The Sovereignty Defence Act (2024) establishes an



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Office with broad powers to investigate organisations and individuals suspected of serving foreign interests, including those involved in elections, and to publish data on them without meaningful legal remedy.

A subsequent 2025 “Foreign Agents Law” has been tabled, targeting foreign-funded NGOs and civic actors deepens this approach, restricting access to international funding and exposing recipients to reputational attacks and potential criminal liability during campaigns (Uitz, 2025). In short, the Helsinki Committee (2025) is warning that this law would “extinguish” them. This framework attempts that those best placed to convert public discontent and external pressure into political change will lose their funding, and thus their existence. This is another part of the paradox of Hungary’s 2026 elections: Orbán’s system is weaker in substance but more protected by design.

A fragile new challenge to Fidesz

The Respect and Freedom party (Tisza) is the first serious challenger of Fidesz to have emerged and already won almost 30% at the European Parliament elections in June 2024, essentially from scratch. In October 2024, Tisza overtook Fidesz in the polls for the first time and in current polling (Politico, 2025). This should, however, be treated with caution, Tisza has a strong lead of some 47% while Fidesz stands about 38%. It should not be forgotten that the far-right “Our Homeland Movement” would likely side with Fidesz, although it currently polls below the 5% threshold. In any case, Tisza will need a five-point lead on election day in a system whose single-member districts strongly favour Fidesz. At the same time, another opposition party, the Democratic Coalition, polls above 5%, thus ironically, the opposition to Orbán could be split among liberal voters.

For many citizens, especially outside major cities, Fidesz still appears as the safest option in an uncertain world. Support for Orbán is strongest among older voters, while young and educated voters are overwhelmingly leaning toward Tisza according to recent polling from Policy Solutions (2025). Yet, the issue of Tisza is to unite a broad coalition of liberal, urban voters to conservative and even far-right voters, that they currently are able to keep together by unclear policy stance, e.g. avoiding a unified position on the Pride parade.

In this context, the rise of Péter Magyar and the Tisza party is both a symptom and a potential catalyst of erosion (Gizińska, 2025). Magyar’s insider background (he was previously part of



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Fidesz and ex-husband of justice minister Judit Varga), his media skills (to the point of being described as narcissic), strong social media appeal and emotional, youthful rhetoric have allowed him to concentrate anti-Fidesz sentiment more effectively than previous challengers, especially in small towns where dissatisfaction with living standards has grown (Rutai, 2024). His approach of creating cells of resistance all over the country, so-called “Tisza islands” could make the difference (Végh, 2025).

Péter Magyar and the difficulty of turning the country around

Yet serious doubts surround both Magyar’s platform and the structural obstacles he would face even if successful. Much of Tisza is organised around Magyar personally rather than a detailed party programme. The Tisza candidates for parliament were presented in mid-November and they have little political experience; purposefully other opposition politicians were not considered, as Magyar perceives them as discredited (Elek, 2025). Analyses and interviews indicate considerable ambiguity around his programme on core issues such as the future of the sovereignty and foreign agents framework, comprehensive judicial reform, media pluralism and Hungary’s long-term EU strategy. Building a nationwide organisation capable of competing with Fidesz in villages and poorer regions remains an enormous task, even with his “Tisza islands”, particularly for a movement centred on one figure in a highly personalised political culture. A wider smear campaign of the government-controlled media outlets will even further intensify.

Even in the scenario where Tisza were to win the 2026 elections, turning the country around would be a multi-year, high-risk undertaking (Shekhovtsov, 2025). Dismantling the foreign-agents and sovereignty regime without provoking legal chaos, depoliticising the courts and prosecution services while keeping access to EU funds, rebuilding independent media and addressing structural poverty as well as low wages would each be a major reform track on its own. Conversations of the author in Budapest in early November 2025 with experts, journalists, activists and diplomats provide cautious hope that Orbán is more vulnerable with a sober recognition that any new government would inherit deeply damaged institutions and expectations that cannot be met quickly.



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Conclusions

Hungary's 2026 parliamentary elections will be a showdown of a hollowed out Orbán's system and his first real challenger Tisza. Multiple paradoxes have emerged. First, Orbán enters the race both weaker due to corruption, declining living standard and decay of services, but continuously well shielded from precisely these realities, due to the state's legal and media machinery. Second, the most credible challenge to this system now comes from Magyar, a former Fidesz insider. Tisza channels the anger of voters who are upset, yet their success would confront them with the structures that empowered Orbán, from politicised courts to an oligarchic economy.

A third paradox is that external pressure both constrains and sustains the regime. EU rule-of-law conditionality has frozen or put at risk billions of euros to Hungary, exposing how dependent the Orbán system is on EU money; yet the government uses this confrontation to feed its narrative of national siege while turning to Chinese loans. Whether Magyar and Tisza can exploit these contradictions, convert internal and external erosion into an alternative model remains to be seen. In the end, embarking on the slow but necessary work of rebuilding independent institutions, will shape not only Hungary's path but also how the EU deals with rising illiberalism inside (Slovakia) and outside, among candidate countries (Serbia), in the years ahead.

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