

Energy Hungry Hungary

Who is responsible for Hungary's energy supply?

A REPORT BY REPUBLIKON INSTITUTE AND CONNECT EUROPE



July 2025

INTRODUCTION

Since the invasion of Ukraine in 2022, the weight of Russian disinformation on Europe has intensified, and the Kremlin's war narratives have increasingly appeared in the public discourse of many countries, sometimes in the messages of pro-Russian media outlets or opposition parties, and in less fortunate countries, in the messages of pro-Russian ruling parties. One of the central elements of these messages is the issue of energy. Already in the first year of the escalation, in preparation for the winter of 2022, the narrative spread that if the war doesn't end, Europe will "freeze" as Russia heats the continent. Threats related to energy prices or energy supplies continue to play an important role in war communications, although fear-mongering about Ukrainian agriculture is also becoming more widespread. In fact, the Hungarian government is ahead of the curve in spreading Russian propaganda, portraying Ukrainians as criminals and mafia members. There is no doubt that energy coming through Russia or Ukraine is an important factor in the supply of the mix of energy of European countries, although many countries have taken steps to reduce or even eliminate their dependence. The Hungarian government is vigorously clinging to Russian energy, not only since the escalation of the war, but going back to 2010, especially since the announcement of its "Eastern Opening" foreign policy. Thus, as the European Union gradually tries to withdraw from Russian energy, it will become increasingly difficult to maintain Hungary's current energy supply, which is heavily dependent on Russia. In a sense, Hungary's energy supply depends on many factors: the country exporting the energy source, the countries through which the energy passes on its way to Hungary, the Hungarian government's foreign policy, and the European Union, of which Hungary is a member. Of course, these factors do not all carry equal weight. The current energy situation is the result of a decade of government neglect, which requires urgent attention, but opinions may differ. In a new joint study by Republikon and Connect Europe¹, we examined what Hungarian respondents think about the factors that determine the success or failure of Hungary's energy supply.

¹ The research was conducted through telephone interviews with 1,000 respondents between July 1 - July 8, 2025. The sample is representative of Hungary's adult population by gender, age, education level, and settlement type. The margin of error is $\pm 3.5\%$.

RESULTS

The majority of respondents agree that the Hungarian government is primarily responsible for the country's energy security. Fifty-one percent chose the government as the main responsible body. Far behind in second place, 16 percent of respondents believe that the European Union is primarily responsible for ensuring that Hungary's energy supply remains uninterrupted. It is important to note that members of the Hungarian government also play a role in the decision-making bodies of the European Union and have veto power on a number of issues, which they exercise more often than anyone else, so the European Union cannot easily influence Hungary's energy supply without the government's participation.

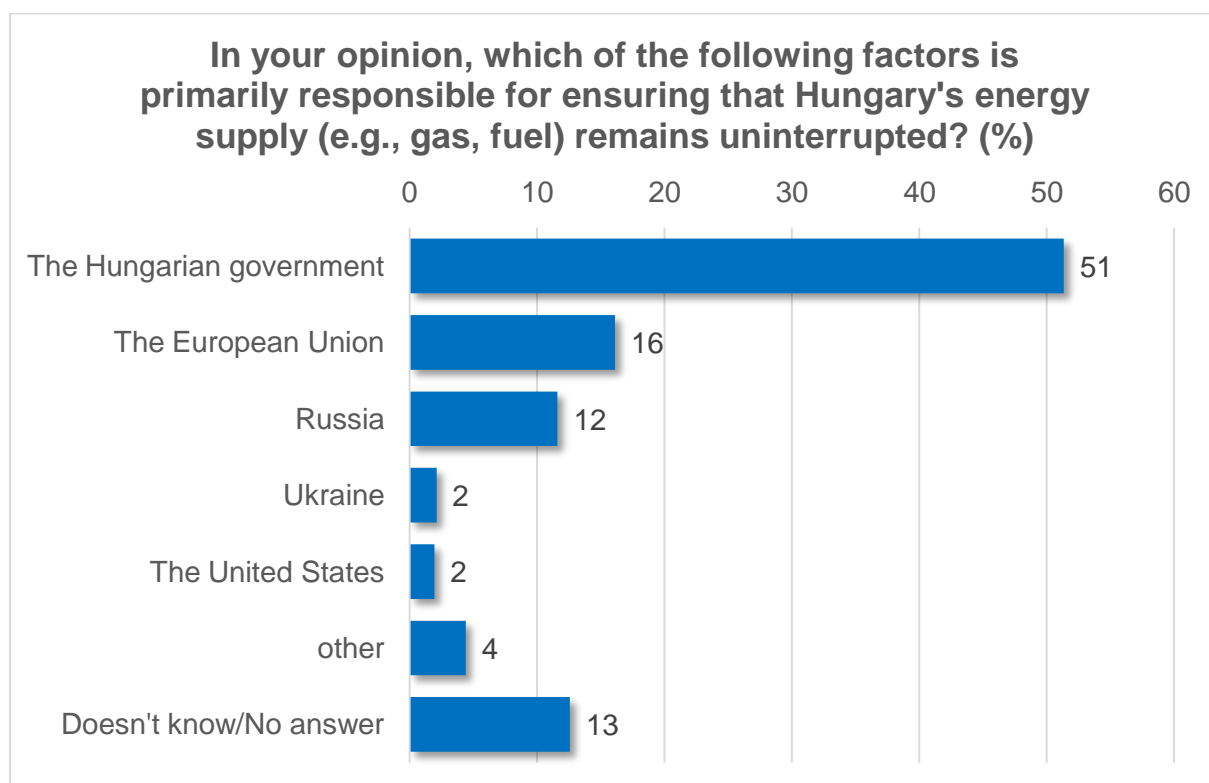


Figure 1: Who is responsible for Hungary's energy supply? (%)

In recent years, a discouraging trend has emerged in respondents' attitudes. Since 2022, victim blaming in connection with the Russian-Ukrainian conflict has spread not only in government circles but also among the Hungarian population, with Ukraine's image deteriorating and Russia's improving. However, our current survey clearly shows that respondents do not overestimate Ukraine's role in Hungary's energy supply: only 2 percent believe that our energy security depends primarily on Ukraine,

while 12 percent think that Russia is the key factor. Overall, it is clear that although both Ukraine and Russia tend to play the "energy card" in their diplomatic efforts, Hungarians are not particularly concerned that either of the two nations at war would be capable or motivated to unilaterally disrupt Hungary's energy supply.

Although there is no doubt that the United States is capable of exerting pressure on the leaders of the countries at war, only 2% of respondents believe that Hungary's energy supply would primarily depend on US actions. It is important to note here that our data was collected before US President Donald Trump floated his latest idea of imposing a 100% tariff on countries importing Russian energy. From the start, the Trump administration has been trying to peddle its own energy exports, so it would, in fact, be in its interest to reduce Europe's energy dependence on the East, even if it means taking drastic measures. However, his measures often do not go beyond the idea phase or simply do not stay in effect for more than a day, so this possibility should not be taken into account for the time being. According to 4% of respondents, the stability of Hungary's energy supply depends primarily on other players.

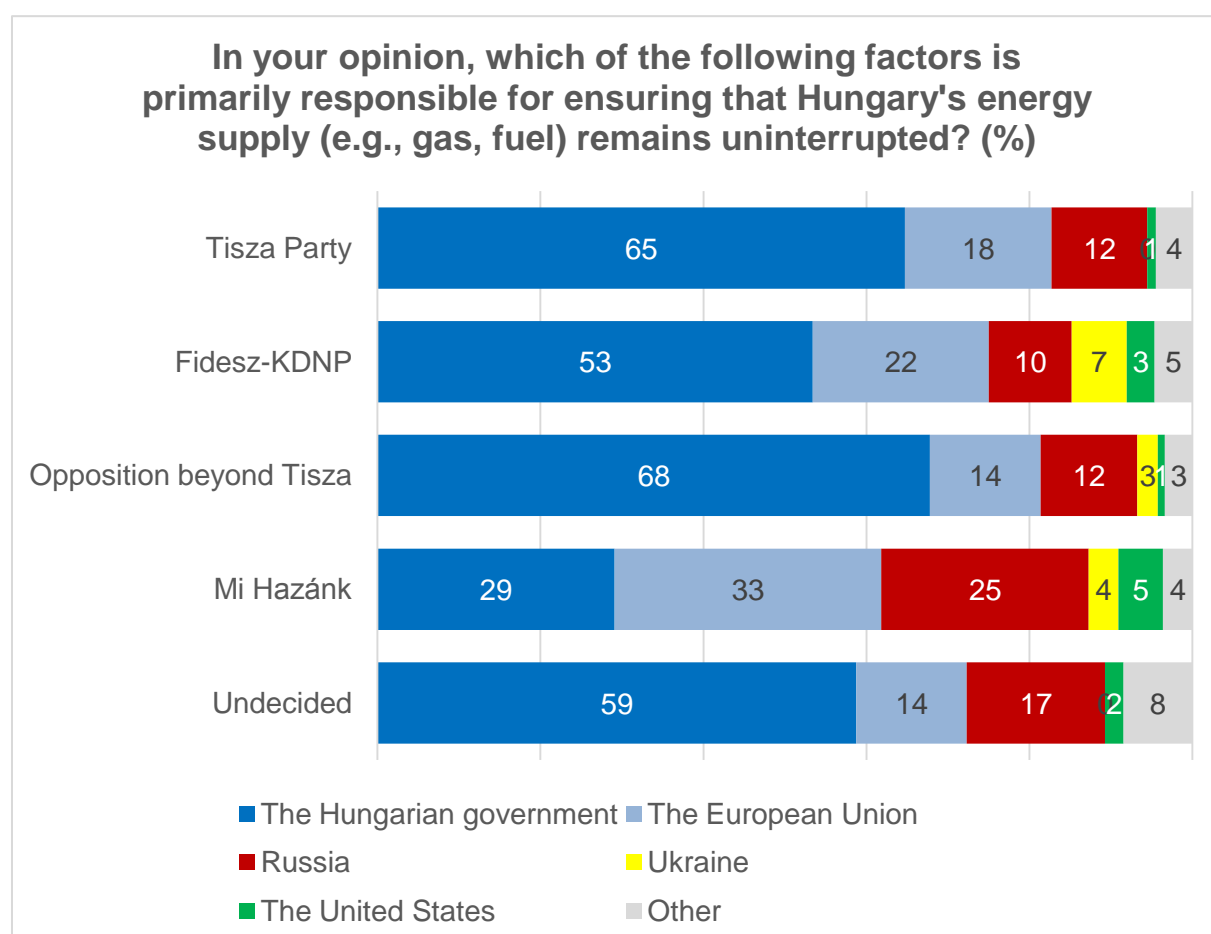


Figure 2: Who is responsible for Hungary's energy supply; party preference breakdown (%)¹

According to the majority of opposition voters, it is primarily the government's responsibility to ensure that the country's energy supply remains uninterrupted. Two-thirds of Tisza Party voters and opposition voters "beyond Tisza" also think so. A similar proportion holds the European Union responsible for this issue. Both voter groups unanimously mention Russia's primary responsibility at 12 percent, while Ukraine's role does not come up at all among Tisza Party voters. Only 3 percent of opposition voters "beyond Tisza" believe that Ukraine is primarily responsible for our energy supply. A negligible proportion of voters in both camps hold the United States primarily responsible.

The majority of Fidesz–KDNP voters also name the government as the primary party responsible for ensuring energy supplies, while one-fifth believe that the EU bears primary responsibility. Ten percent mention Russia. Interestingly, most pro-government voters chose Ukraine as the primary responsible party (7 percent). Although about a year ago there was government communication that Ukraine was threatening the energy supply of Hungary and Slovakia, less than a tenth of pro-government voters believe that Ukraine is primarily responsible. However, this does not rule out the possibility that Ukraine's role in the background is perceived more widely.

Perhaps even more interesting is the response of undecided voters. They also clearly acknowledge the government's responsibility, but only 14 percent consider the European Union to be primarily responsible. In contrast, 17 percent mention Russia, which is an exceptionally high figure compared to the other groups (except for Mi Hazánk voters, but the sample size there is small).

Perhaps most excitingly, while the government consistently presents itself as a protector – i.e., “solving” the energy supply issue – only half of its own voter base believes that the government is primarily responsible for this issue. This may suggest that pro-government voters believe more strongly in the narrative that the world is “against us,” that the great powers make decisions over our heads, and that the

¹ The chart broken down by party preference does not include 'Not sure' or 'N/A' responses, so it is possible that, except for Mi Hazánk voters, more than 51 percent of respondents across all parties view the government as responsible for the energy supply issue.

government is merely defending us – fighting against them. Opposition voters, on the other hand, are much more likely to believe that the government's primary responsibility is indisputable.

The responses of undecided voters are perhaps the most interesting from this perspective. More of them hold the government primarily responsible than pro-government voters, although fewer than opposition voters. Fewer mention the responsibility of the EU – one of the government's strongest communication weapons – than that of Russia. This is particularly noteworthy, as in this case two partly contradictory narratives may come into play: that of the government, which argues that we should not provoke Russia, and that of the opposition, which argues that it is not right to do business with them. Only additional research could reveal which narrative is at work in the background.