

FIDESZ WINS HUNGARY'S DOUBLE ELECTIONS AS NEW OPPOSITION CHALLENGER EMERGES

TISZA's sudden emergence signals changed playing field, hinting at tougher electoral race for 2026

11 June 2024

EXECUTIVE SUMMARY

Hungary's ruling Fidesz-KDNP has won the country's EU elections, securing 11 of 21 MEP seats, down from 13 seats gained in 2019. While Fidesz also performed well in the local elections, and has expanded its number of supporters in EU elections to two million, the arguable winner of Sunday's double vote is the newly formed Respect and Freedom Party (TISZA) of ex-government insider Péter Magyar.

Having entered party politics only two months ago, TISZA secured nearly 30% of the popular vote on a turnout of 56%, gaining seven MEP seats and also emerging to prominence in the Budapest City Council elections. The party's emergence came together with crumbling support for Hungary's establishment opposition parties. Alongside Fidesz and TISZA, only the centre-left Democratic Coalition (DK) and the far-right Our Homeland will send MEPs to Brussels/Strasbourg of the 11 parties and alliances which ran in the EU election.

No opposition party has reached 30% in popular support since Fidesz took power in 2010, meaning that TISZA is well placed to emerge as a strong challenger to PM Orbán's rule in the 2026 parliamentary elections. However, it remains uncertain whether Magyar will be able to keep up the momentum behind his support. At the same time, support for the governing Fidesz remains stable, which is a remarkable development on its own for a party that has been in power for 14 years.

 Below, Aretera takes deeper look at the aftermath of one of 2024's most anticipated electoral contests in Central and Eastern Europe.

POST-ELECTION LANDSCAPE

On 9th June, Hungarian citizens went to the polls to vote in their country's local and EU parliamentary elections, held together for the first time in the country's democratic history. On a turnout of 56%, the ruling Fidesz-KDNP alliance of Prime Minister Viktor Orbán has won the EU elections. In line with pre-election polls, the governing bloc secured 44.6% of the vote, gaining 11 of Hungary's 21 MEP seats in the European Parliament – down from 13 MEPs and 53% of the vote secured in 2019. As widely expected, the newly emerged Respect and Freedom Party (TISZA) of ex-government insider Péter Magyar has become Hungary's second most popular political formation by securing nearly 30% of the vote, securing seven MEPs.

In addition to Fidesz and its newest rival, only two other formations from the eleven parties/alliances running managed to pass the 5% threshold. These include a three-party alliance led by the centre-left Democratic Coalition (DK) of former social democratic PM Ferenc Gyurcsány, which will have two MEP seats (down from four) and the far-right Our Homeland party, which will delegate one MEP after failing to pass the threshold in 2019.

EU ELECTION RESULTS

EU Parliamentary Election Results Breakdown				
Party/Alliance	Popular Vote – June 2024 (%)	Expected EU Affiliation	Number of MEPs (2024)	Number of MEPs (2019)
Fidesz-KDNP (right-wing populist, soft Eurosceptic)	44.6	ECR*	11	13
TISZA (centre-right, anti-corruption, pro-EU)	29.6	EPP*	7	did not run
DK-MSZP-Dialogue (three-party alliance, centre-left)	8.1	S&D	2	ran separately
Our Homeland (far-right nationalist, Kremlin-leaning)	6.7	ID*	1	0
Total			21	21

Source: National Election Bureau of Hungary. The junior ruling KDNP will likely leave (or be pushed out of) the EPP if TISZA joins the centre-right European bloc. Fidesz may target the yet-to-be-formed group around the ECR but this remains unclear. Our Homeland is hoping for an alliance with Germany's AfD or, alternatively, the ID Group.

WINNERS & LOSERS

For PM Orbán's ruling bloc which has been in power since 2010, the result is considered a relative victory. Their share of the popular vote is down by 9% compared to 2019, largely due to the high overall turnout (56%). At the same time, more than two million citizens voted for Fidesz, the highest number of voters they have managed to rally in an EU election. In addition, the party was also successful in rallying the pro-Fidesz voter base despite the recent child abuse pardon scandal, which brought down former President and Fidesz ally Katalin Novák and former Justice Minister Judit Varga in February. Furthermore, Fidesz will continue to command a respectable number of MEPs in the new European Parliament.

Of the 11 parties/alliances running in the EU elections, the real winner is undoubtedly the newly formed TISZA, which has emerged as not only the clear leader of the opposition but also a potential challenger to PM Orbán's rule in the 2026 parliamentary elections. The party secured nearly 30% of the vote despite entering Hungarian politics only two months ago, after former SOE executive and government insider Péter Magyar broke ranks with Fidesz following the recent child abuse pardon scandal.

TISZA capitalized on massive voters' dissatisfaction with the parties of the establishment opposition, which were dealt their largest ever defeat in the latest parliamentary election in 2022. Accordingly, most opposition voters chose to support TISZA, while several parliamentary opposition parties fell out of the EU Parliament, including the liberal Momentum and the far-right-turned-conservative Jobbik. Other parties hoping for an electoral breakthrough – such as the satirical-progressive Two-Tailed Dog Party (MKKP), the centre-right MMN party of former opposition candidate for PM Péter Márki-Zay and the 2RK party of longtime former Jobbik leader Gábor Vona – also stayed well below the 5% threshold.

The far-right Our Homeland also ended the election with a decent performance. While the party was hoping for two seats and TISZA's emergence has likely impacted their vote share, most Our Homeland supporters remained committed to their party, ensuring its entrance to the EU Parliament. The party also did well at the regional level as TISZA did not run in Hungary's county assembly elections, leaving Our Homeland in second place in nearly all the 19 counties.

Arguably the biggest loser of the EU election is the centre-left Democratic Coalition. Prior to TISZA's emergence, the party hoped to consolidate its position as Hungary's lead opposition party. Instead, support for DK, which ran together with two smaller centre-left/green formations, is down by nearly half. DK was heavily impacted by the rising TISZA, which claimed that they oppose “both Fidesz and the blue Fidesz [DK]”, pointing to DK leader Ferenc Gyurcsány, who remains one of Hungary's most polarizing political figures.

LOCAL ELECTIONS BRING VIRTUAL TIE IN THE CAPITAL

As for Hungary's local elections, centre-left Budapest Mayor Gergely Karácsony has narrowly beaten former State Secretary for Transport Dávid Vitézy, his main challenger. In the most competitive mayoral race in the history of the Hungarian capital, Karácsony secured 47.53% against Vitézy's 47.49%, winning by only 324 votes. Prior to the election, Karácsony was the clear favourite to win, however Fidesz candidate for Budapest Mayor Alexandra Szentkirályi dropped out of the race only two days before the vote to endorse Vitézy.

De facto rejecting the results of the Budapest mayoral race, Vitézy will formally demand a re-count due to the large number of invalid votes (around 25,000). Observers believe this number is due to the fact that some Fidesz voters did vote for Szentkirályi despite her endorsement of Vitézy, while TISZA leader Péter Magyar called on its supporters not to support either the DK-supported Karácsony or his Fidesz-backed challenger.

Whoever wins the mayoral race in Budapest will not have a majority in the City Assembly, indicating tough coalition talks before the new assembly begins its work in October, while it is also possible that the new Mayor will have to govern with the assistance of ad hoc alliances.

Elsewhere in the country, both Fidesz and the opposition have managed to keep the majority of their strongholds. The ruling bloc lost five of Hungary's 25 larger cities but recaptured another four, now controlling 15 of them. In towns with a population of less than 10,000, Fidesz was the absolute winner, as in previous elections. Notably absent from the local elections was TISZA (due to their late debut to Hungarian politics in the middle of an election campaign), which competed only in a small number of cities and the capital. However, they performed well in the Budapest elections, securing 10 of the 32 councilor seats.

LOOKING AHEAD


Unlike in several European countries, especially in Central and Eastern Europe, EU elections in Hungary bear political significance due to the large turnout recorded at the polls and the approaching 2026 parliamentary elections.

TISZA's sudden emergence and clear victory – with nearly 30% – on the opposition side of the aisle strongly indicates that opposition voters want a new alternative to tackle Fidesz. No opposition formation has reached 30% in popular support since Fidesz took power in 2010, suggesting TISZA is well placed to challenge Orbán in a potential one-on-one race in the 2026 parliamentary elections. However, it remains uncertain whether Magyar, seen as a controversial figure by many, will be able to keep the momentum into 2026. At the same time, support for the governing Fidesz remains stable, a remarkable development for a party in power for 14 years. Simultaneously, most opposition parties performing poorly in Sunday's elections now face the threat of fading away politically in the long run.

At the EU level, TISZA will likely join the European People's Party (EPP), from which Fidesz was ejected in 2021. While the junior coalition KDNP is still an EPP member, our baseline scenario assumes that they will be unlikely to stay in the group as KDNP has only one MEP, while TISZA has seven. Accordingly, both KDNP and Fidesz, which is currently non-affiliated, could join the radical right-wing bloc that may be formed around the ECR, while staying independent also remains an option.

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