



CORRUPTION
RESEARCH CENTER
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**Print media expenditure of government institutions and
state-owned companies in Hungary, 2003-2012**

Descriptive statistics and observations

1st Report

Budapest, May 2013



The study was prepared by the Corruption Research Center Corvinus University Budapest (CRC CUB)

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Print media expenditure of government institutions and state-owned companies in Hungary, 2003-2012 -- Descriptive statistics and observations

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„La liberté existe toujours. Il suffit d'en payer le prix.”

[Andre Malraux]

"The basis of our governments being the opinion of the people, the very first object should be to keep that right; and were it left to me to decide whether we should have a government without newspapers or newspapers without a government, I should not hesitate a moment to prefer the latter. But I should mean that every man should receive those papers and be capable of reading them."

[Thomas Jefferson]



Government Advertising Incomes in the Hungarian Print Media, 2003-2012

Descriptive statistics and observations

Summary

The transparency of government funding of the media is an essential element of the freedom of expression. However, this transparency is weak in the Hungarian media. The Hungarian media relies heavily on government advertisement spending. The public advertising orders can determine the fate of a media company. This dependency can threaten the freedom of the press since the government has the means to influence media content. This report has been prepared to describe the role of state purchases in the advertising incomes of the printed media. We used descriptive statistics to describe the main characteristics of state advertisement purchases and the way it changes over time.

The analyzed data are from the list price database of the Kantar Media. The list price means the basic published price. The data collectors at Kantar Media estimate the price of every advertisement based on its defining characteristics such as size and each media firm's official price list. Our data do not take into account any potential discount.

We analyzed the way how 39 billion Ft (134,752,263 Euro at 2012 exchange rate) were spent in the period of 2003 to 2012. Our analyses showed that the highest amounts of state funds were spent in 2008. The 10 biggest state purchaser's advertisement funds generated the 73,9 % of the total state advertisement expenses.

We developed a simple indicator to describe the political dependency of printed media. The indicator compares the total amount of state funds spent on advertisements on all political journals and newspapers in comparison with the amount spend on the printed media supporting the opposition parties. During the period 2003 to 2005 this proportion stayed around 20%, in the period of 2007 to 2009 it rose to 30%. The lowest state advertisement incomes of the print media of the opposition were in 2011 and 2012.

Based on our findings, we can conclude that political changes deeply influenced the advertising market. The spending of state advertisements in Hungary is highly concentrated on a small group of government institutions and firms. The changes in the advertisement incomes of left and right wing leaning printed media follows closely the changes of governments. The advertising incomes of the leftist printed media had dramatically been decreasing from 2008, so that this sum had been reduced to less than one third of 2003 by 2012. The changes in the advertising incomes of the right wing media is similarly radical, but in the opposite direction. The state advertising incomes of the right wing media was more than two times higher in 2012 than in 2010.

The next step of our research will be to connect the database of state advertisements with the Hungarian Public Procurement Database (MaKAB) that our research center is currently working on.



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Introduction

Advanced constitutional democracies are based upon freedom of the press. The primary role of the media is to promote transparency and accountability, sometimes demanding it. It goes without saying that in a constitutional democracy freedom of the press is guaranteed by law and protected by institutions.

Realization of this freedom of the press, however, is not so simple. To do this, research is required into political systems and media relations, the institutional framework of the media, the role and status of journalism and the news media in different countries, the role of media policy, even the employment status of journalists. The relationship between diverse political and media systems often has quite different patterns from country to country. All of these factors need to be taken into account as well as a comparative analysis among different countries in order to answer questions concerning enforcement of the freedom of the press and its relationship within the institutional framework of the media.¹

For the realization of freedom of the press, it's not all the same how centralized the news media market is (a), under what concentration of ownership does media publishing companies function (b), the advertising revenue structure of the press and these publishing companies (c), including the income ratio of this advertising revenue (c1). If we only focus on the latter, it's not all the same what is the concentration of advertising revenue (c1.1), or the role of advertising revenue from government and state firms within the total revenue of a company (c1.2.) and, if we dig deeper, alongside what concentration does state advertising spending takes place (c1.2.1.).

The brief analysis below focuses on only the latter two questions (c1.2 and c1.2.1.) and, as such, merely represents the first results of our research. For the two questions being studied -- the role of spending by the government on advertising revenues and the structure of government spending on advertising -- only the primary results are presented: descriptive statistics and the temporal changes in the characteristics of the data.

¹ See Daniel C. Hallin – Paolo Mancini (eds.): *Comparing Media Systems. Three Models of Media and Politics*, Cambridge University Press, 2004, és Daniel C. Hallin – Paolo Mancini (eds.): *Comparing Media Systems Beyond the Western World*, Cambridge University Press, 2011.



A study of the advertising expenditures by government and state-owned companies is reinforced by the following conclusions below.

We believe that in Hungary during the 2000s one of the most sensitive contact points between the world of politics and the press is that of advertising revenues from public sources. The greater the share of these revenues then the greater the economic advantage of news outlets in the face of rivals. On the other hand, the higher the proportion of government revenues within the total revenue of a news publisher, the more government influence may be exercised on the published content as well. The government can simply "pay off" a media company, thereby effectively limiting freedom of the press.² Of course, this kind of behaviour is not limited to just governments. The advertising spending of private companies is similar: content is restricted which may be unfavourable for a company.

Most newspaper readers rarely think about the fact that the money that is paid at a newsstand for a paper does not cover the total costs of production and distribution, but that it is only because of advertising revenue that they pay only so much. If there is a drop in advertising revenue, then the price of the media product increases or the cost of production is reduced which, in turn, deteriorates the quality of the newspaper.

Political changes and a change in government may affect the advertising market, but the size and proportion of these changes can be very different depending on the government. The reason for this study is that we have no factual knowledge about what happened in this respect in Hungary in the 2000's. How did the size of government and state-owned enterprises advertising expenditure change? How concentrated is this market? To what extent is government advertising spending based purely on political considerations? How has the weight of influence changed under different governments?

This study is intended to answer these questions using data for the period between 2003 and 2012. The data were collected by Kantar Media and our research collaborator, Kreatív Online, made it available to the Corruption Research Center.

² It should be noted that the study does not deal with restriction on the freedom of the press in another effective way. The state regulatory authorities control the media through criminal legal powers to exert indirect pressure on media companies. "If you behave well, you will not be penalized (as much)" principle is what this is all about.



These are the first steps to be taken -- but with this we also intend to show worthwhile and necessary evidence-based knowledge about the relationship between the government and the media. Indicators that are observable and can be analyzed over the long-term are needed in order to later examine if causal relationships have taken place.

This report is the first part of a comprehensive research program, and is closely related to other research programs at the CRC CUB³. The first part deals with the database, followed by a description of base statistics pertaining to state advertisements, after which print advertising spending characteristics will be discussed, in particular its political aspects, and finally ending with a summary of the results and an insight into future research plans.

³ The CRC CUB as Hungarian participant is part of the EU 7 framework programme "ANTICORRP—Anticorruption Policies Revisited. Global Trends and European Responses to the Challenge of Corruption" (Project number: 290529; Call identifier: FP7-SSH-2011-1), in which special importance will be given to the study of the structure of the relationship between media and corruption. See <http://anticorpp.eu>



1. The Database

This report is dealing with only the print media. The reason for this is the following: despite the Internet gaining ground, the print media still plays a key role in informing and shaping civic society. In Hungary, age plays an important role in determining whether the public obtains information more from the print media or the Internet. Generally, the elderly don't obtain information from the Internet, while younger generations generally aren't consumers of political dailies.

Our examination of Internet portals is limited by the difficulty in defining the object being studied (what is part of a news portal and what is not, what advertising techniques are used such as pop-up windows, a continuous text interface, etc) as well as the fact that data pertaining to advertising and advertising expenditure data is more difficult to access for research. Furthermore, the political orientation of news websites is not nearly as established as with the print media, hence changes in support through the use of advertisement orders are not clearly discernible as in the case of print media.

The data analyzed for the report comes from the Kantar Media⁴ list price database. List price data is how much it costs for an advertisement, based on estimates from the price list of companies. This price does not include volume, agency or other benefits. The amount you actually pay to the advertiser is usually lower. The experts at Kantar Media manually measured and categorized the advertisements in the print media. For television and radio, software is used to look for those advertisements that have been already recorded, and the company staff then reviewed them again to see if they could find new ones among them. For some advertisements in public spaces, they received data that were self-reported by media owners on a monthly basis. Of those market participants who did not provide such a declaration, Kantar Media purchased the information from Outdoor Media Audit Kft. (<http://www.omaudit.hu/>). The Internet, indoor (indoor posters) and cinema advertisements are all based entirely on self-reporting.⁵ Our database contains data for 110 state ordered advertisements from early 2003 until the end of 2012 and we analyse in the report only the data referring to print media.

⁴ <http://www.kantarmedia.hu/>

⁵ <http://www.kantarmedia.hu/reklamkoltesmeres.html>



The analysis of list price advertising spending is problematic in two respects. First, the list price is assumed to be higher than the amount actually paid, because it does not account for discounts. There is no information on the extent of this or the criteria used, as well as the decision-making process. Accordingly, based on the published data we can overestimate the media expenditure of government and public enterprises. The data may be biased in the other direction as well as the special requests for an advertisement after it has been placed means the premium would be paid more than once. On the other hand, government "assistance" is one reason why an advertisement is paid for at a much higher rate than the list price, with the difference between the prices paid and the market price wandering to one party or the other, or their background institutions, thanks to the help of corrupt intermediaries (brokers).⁶ The other similar data-related problem is that the data is partially based on the self-certification of the person selling the advertising space/time.

As a first approach, however, we can assume that these effects, if they exist, affects all media products being observed in the same manner and direction – thus it doesn't change the proportions either between individual media products and advertising spaces, nor the rate of advertising expenditures within individual state institutions and state companies.

Another limiting factor for chronological comparisons is that the annual increase in price rates for the advertising market is not known. In this paper we assume that the observations from the Kantar Media team have taken into account the characteristics of sub-market price changes, that is, from year to year they counted on annual list price increases. Furthermore, the available data only records the year of publication, therefore monthly or quarterly time-series analysis (trends, trend turns, to explore possible seasonal effects) were not possible.

The raw data collected by Kantar Media were transformed, converted and new variables were formed. The study was performed on the improved database.

⁶ Among those who have written about this corruption technique is Szántó, Z. – Tóth, I. J. – Varga, S.: The social and institutional structure of corruption: some typical network configurations of corruption transactions in Hungary In: Vedres, B. – Scotti, M. (eds.): Networks in Social Policy Problems, Cambridge University Press, 2012. pp. 156-176. in Hungarian: http://www.crc.uni-corvinus.hu/download/cup_2011_hu_110326.pdf



2. Main Descriptive Statistics of State Advertisements, 2003-2012

The following are some statistical characteristics of the database described in table 2.1. The database contains the data of 110 state companies of the government as advertising customers and a total of 324 dailies and journals in which the purchased advertisements appeared. During the period in focus, total print media advertising expenditure of the state is estimated at 47 billion forints. In particular, the estimated cost of advertisements in dailies is 34.1 billion forints, in weekly and monthly magazines 13.3 billion.

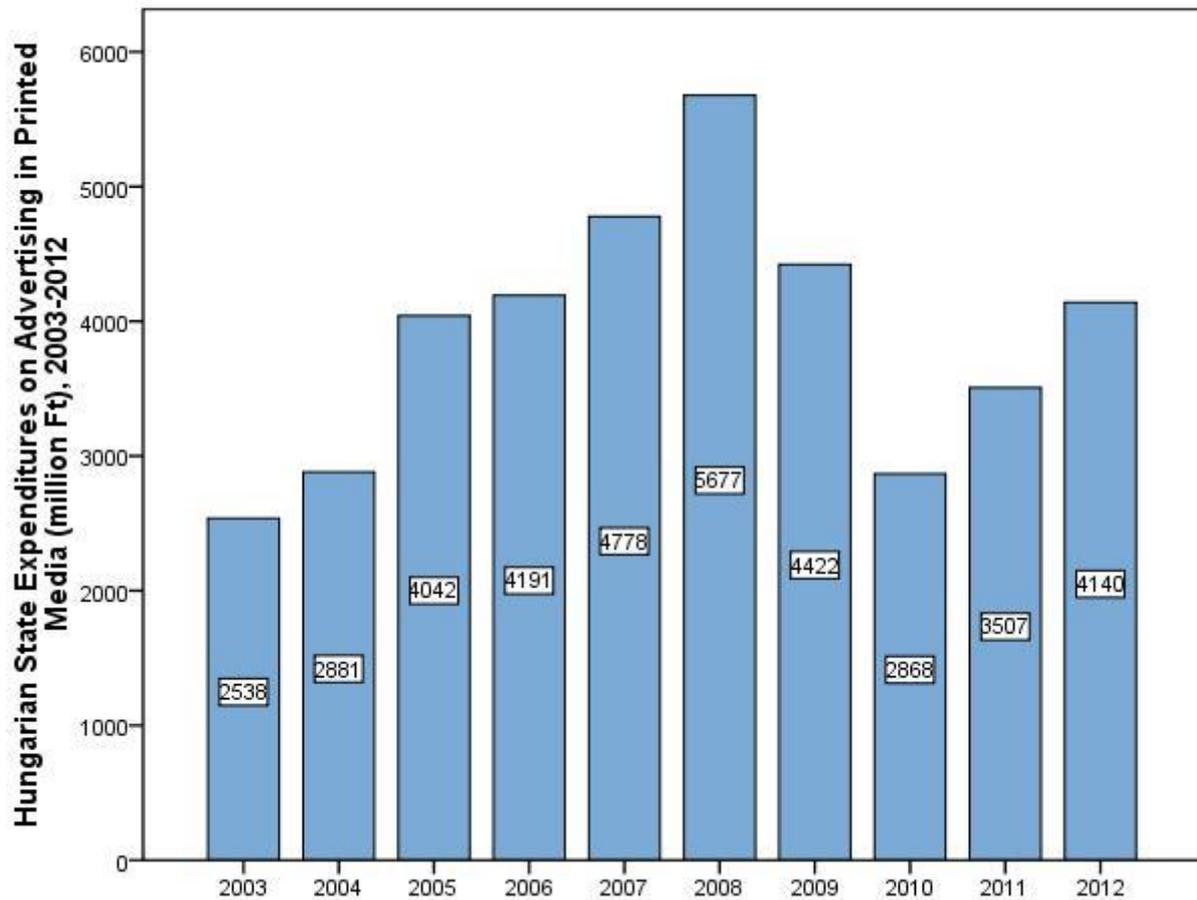
Table 2.1 Main descriptive statistics of state advertisements

State media purchasers (number)	110
Publishers for state advertisements (number)	158
Dailies and journals for state advertisements (number)	332
Amount spent on advertisements appearing in dailies, 2003-2012 (million Ft)	28,175
Amount spent on advertisements appearing in journals, 2003-2012 (million Ft)	10,868

Source: calculations by the CRC CUB based on data from Kantar Media



Figure 2.2: Hungarian State Expenditures on Advertising in Print Media (million Ft), 2003-2012



Source: calculations by the CRC CUB based on data from Kantar Media

Between 2003 and 2007 there was a gradual increase in the amount of state media expenditure. In 2008 advertising spending jumped significantly compared to 2007, but in 2010 it fell back to the amount spent in 2004.

The period under review covers two parliamentary election years, in 2006 and 2010. It is assumed that in election years there is an increase in the amount of public spending; as in other areas, this is supposed to also stand true for advertisements, but the data do not support this expectation. Ironically, and a phenomenon later to be analyzed, the total of state media spending was greatest during the financial crisis of 2008, approximately 5.5 billion, and in 2009 it was estimated at nearly 4.5 billion. In 2008, this value exceeded more than two times the starting value in 2003.



Print media expenditure of government institutions...

State advertising expenditure is highly concentrated, with nearly 60 percent connected to three organisations.

Table 2.3: Top ten state advertisers in print media, 2003-2012

Rank	Name	Advertising expenditure 2003-2012 (million Ft)	Proportion of total state expenditure (%)
1	GAMING INC.	9,478	24.3
2	NATIONAL DEVELOPMENT AGENCY	5,957	15.3
3	PRIME MINISTER'S OFFICE	3,284	8.4
4	HUNGARIAN POST	2,084	5.3
5	DEBT MANAGEMENT AGENCY	1,739	4.5
6	HUNGARIAN TOURISM INC.	1,685	4.3
7	PALACE OF ARTS	1,314	3.4
8	HUNGARIAN DEVELOPMENT BANK	1,292	3.3
9	ECONOMY AND TRANSPORT MINISTRY	1,207	3.1
10	HEALTH MINISTRY	817	2.1
Total		28,857	73.9

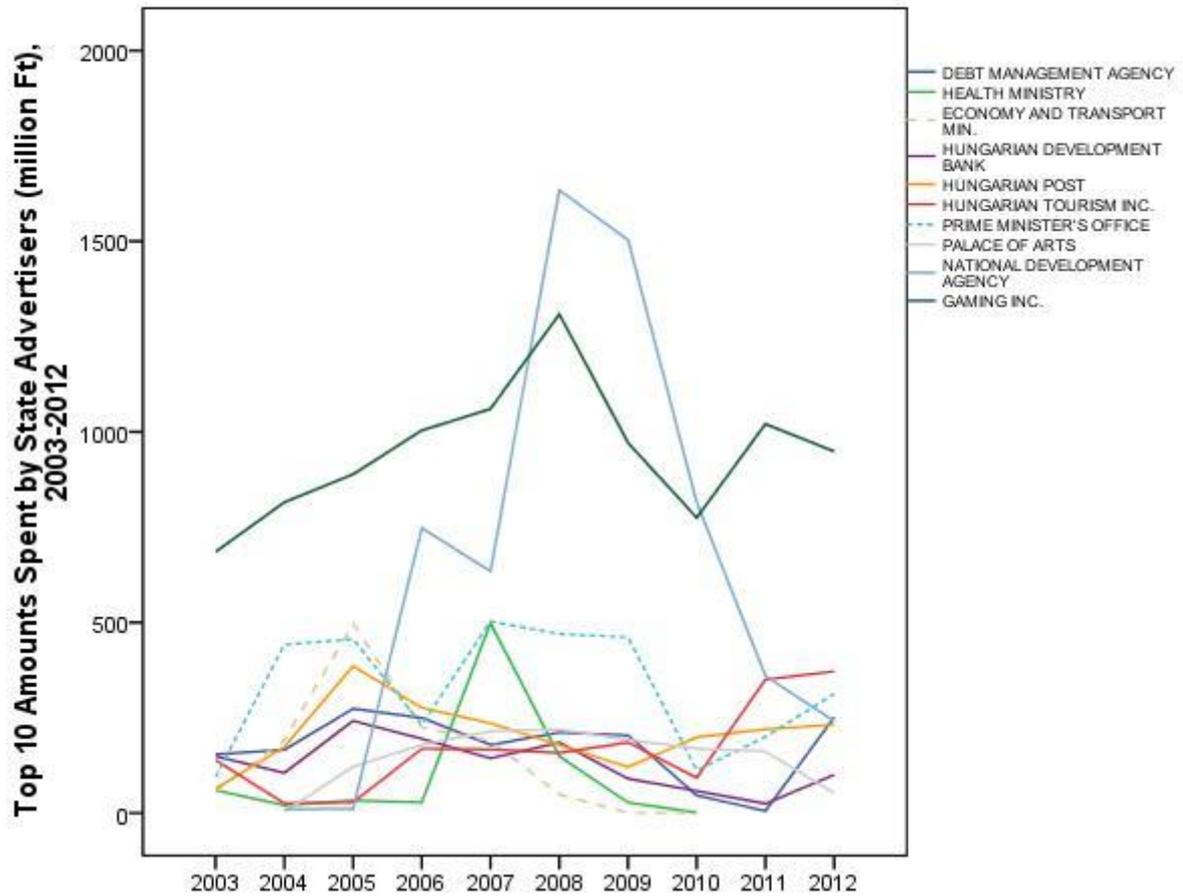
Source: calculations by the CRC CUB based on data from Kantar Media

Note: the data corresponds only to those years when the given institution was in operation and doesn't show the expenditures of their predecessors.

If we look in more detail in at the expenditure of the top state advertisers, we can confirm this. In all, the top ten state advertisers make up 73,9% of all government advertising expenditure for the entire period, while the remaining share of government advertising is split among 100 advertisers. A quite large difference can be observed between the two largest advertisers and the other eight.



Figure 2.4: Amounts spent by Top 10 state advertisers (million Ft), 2003-2012

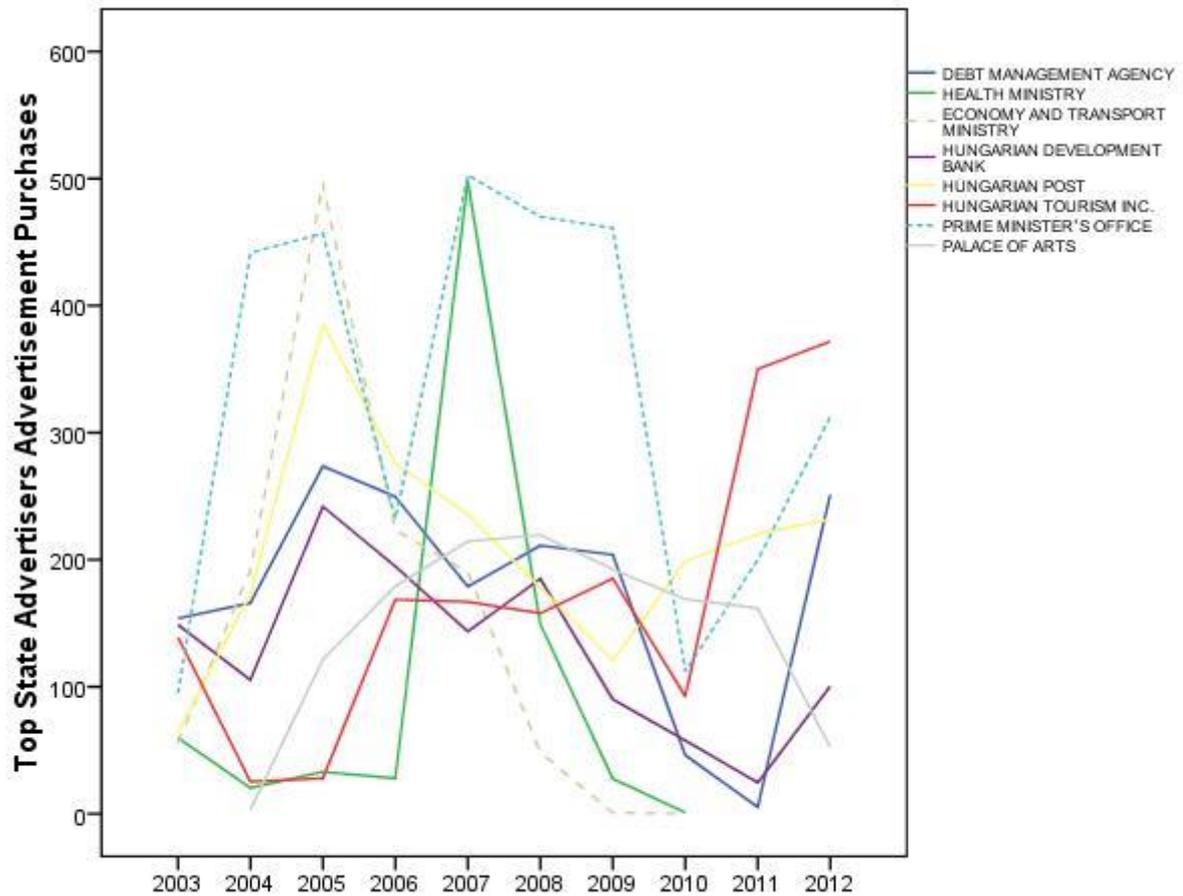


Source: calculations by the CRC CUB based on data from Kantar Media

Figure 2.4 also clearly shows how the two largest advertisers are separated from the rest of the large advertisers. The advertising expenditure of the NDA in 2008 is so high that it can account for the spike in total state advertising expenditure on its own. The expenditure of Gaming Inc. is more even; throughout the period large sums are spent on advertising.



Figure 2.5: Top State Advertisers' Advertisement Purchases, excluding Gaming Inc. and the NDA



Source: calculations by the CRC CUB based on data from Kantar Media

Aside from the spending by Gaming Inc. and the NDA, government advertising expenditure of the eight largest state advertisers fluctuated strongly during the period in question. Not very common trends can be observed, but it should be stated in 2010 a strong decrease was observed, than from 2011 on strong growth was characterized in most cases.



3. The Politically Affiliated Print Media

Within the print media we define as *politically affiliated print media (or political print media)* a daily or weekly newspapers in which political and public issues are dealt with *and* they classify themselves as left-wing, liberal or right-wing based on their tone and subject matter. For simplicity, a working definition of "*left-wing oriented*" and "*right-wing oriented*" will be used.

We consider the following papers to be *right-wing oriented*:

„*Magyar Nemzet*”, „*Magyar Fórum*”, „*Heti Válasz*”.

We consider the following papers to be *left-wing oriented*:

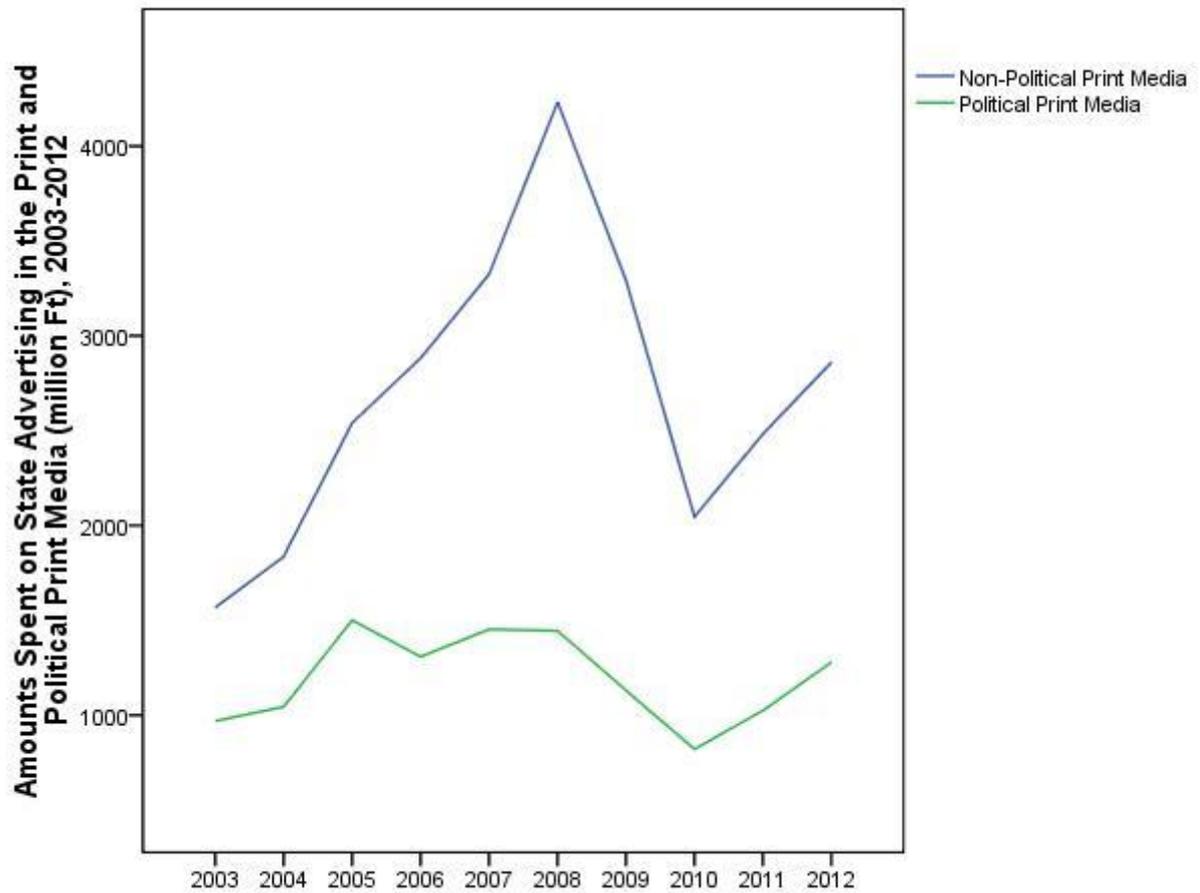
„*Népszava*”, „*Népszabadság*”, „*Magyar Narancs*”, „*HVG*”, „*168 óra*”.

Due to its particular situation, the *Magyar Hírlap* can be found in both categories: the current owner bought the paper in 2005, but the editors were replaced only in November 2006, for this reason the paper is considered *left-wing* until 2006, and from then on it is listed as part of the *right-wing* group.

Figure 3.1 shows that revenue from state advertising within the political print media broadly follows that of the entire print media, but in 2008 a significant jump can be observed in the latter.



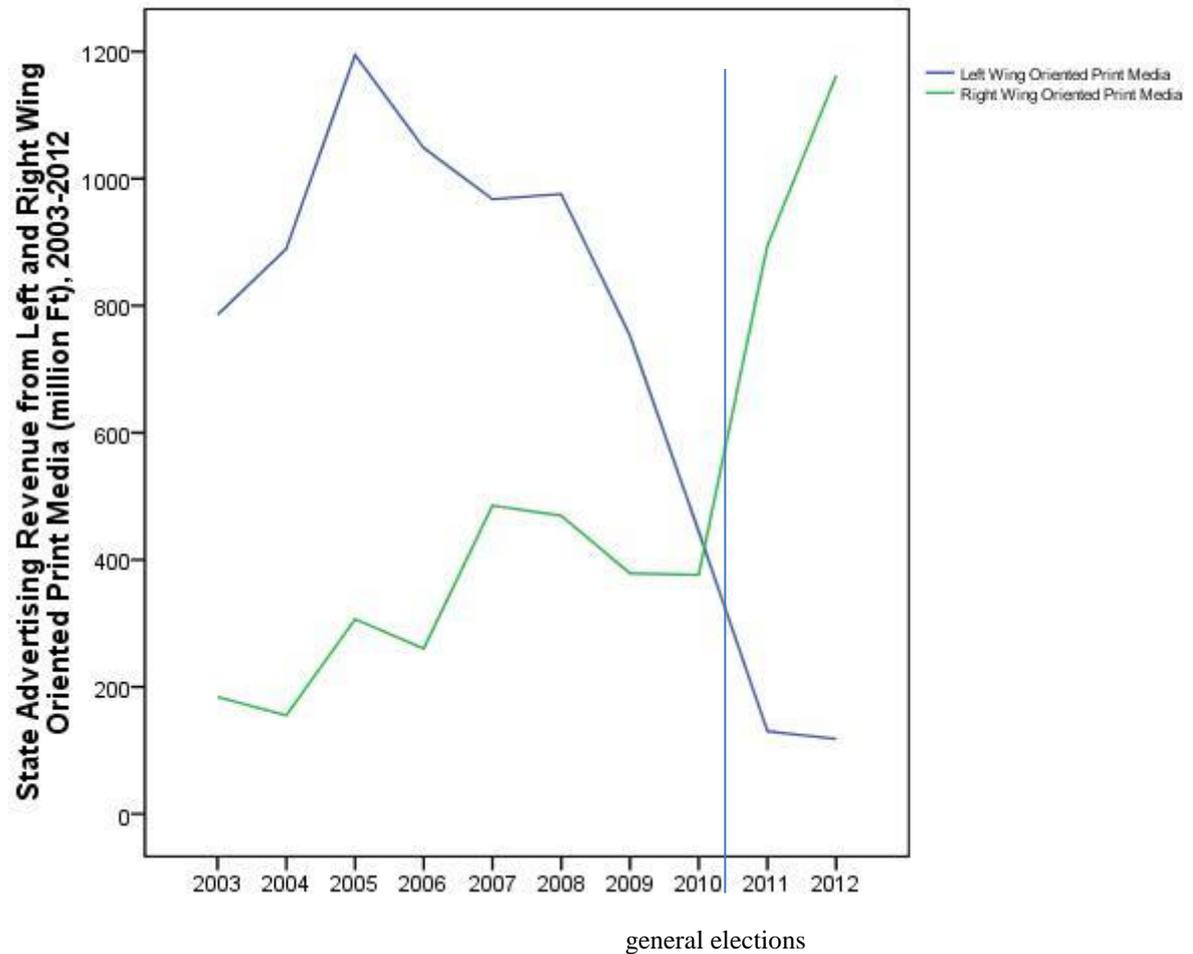
Figure 3.1 Amounts Spent on State Advertising in the Print Media and Political Print Media (millions Ft), 2003-2012



Source: calculations by the CRC CUB based on data from Kantar Media



Figure 3.2 State Advertising Revenue in Left and Right Wing Oriented Print Media (millions Ft), 2003-2012

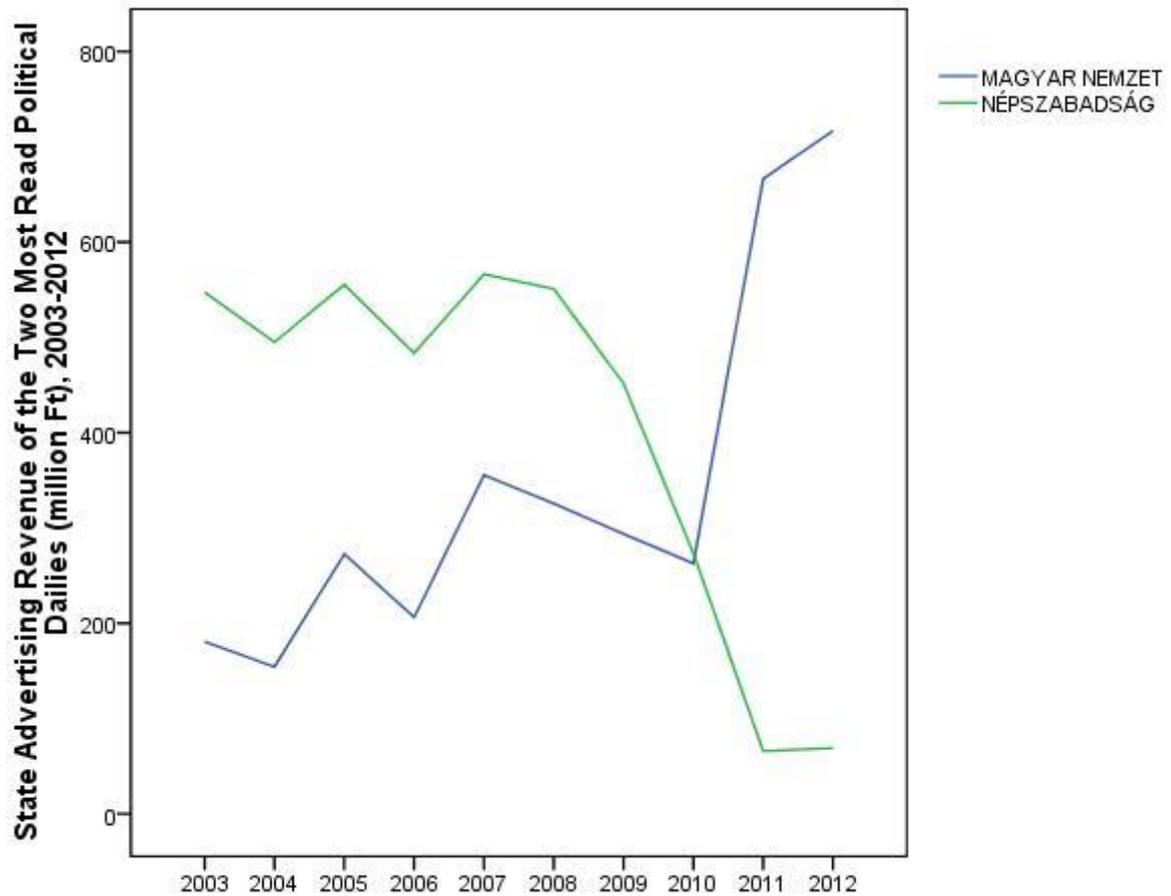


Source: calculations by the CRC CUB based on data from Kantar Media

In our study left-wing papers had a much larger amount of state advertising revenues between 2003 and 2008 than right-wing ones, but from this we can't draw any conclusions since more left-wing papers were analysed than right-wing ones. The massive decline in advertising revenue for left-wing papers started in 2009; in 2010 and 2011 this decline merely intensified, while the increase in advertising revenue for right-wing papers only jumped in 2011 (see Figure 3.2 above).



Figure 3.3: State Advertising Revenue of the Two Most Read Political Dailies (millions Ft), 2003-2012

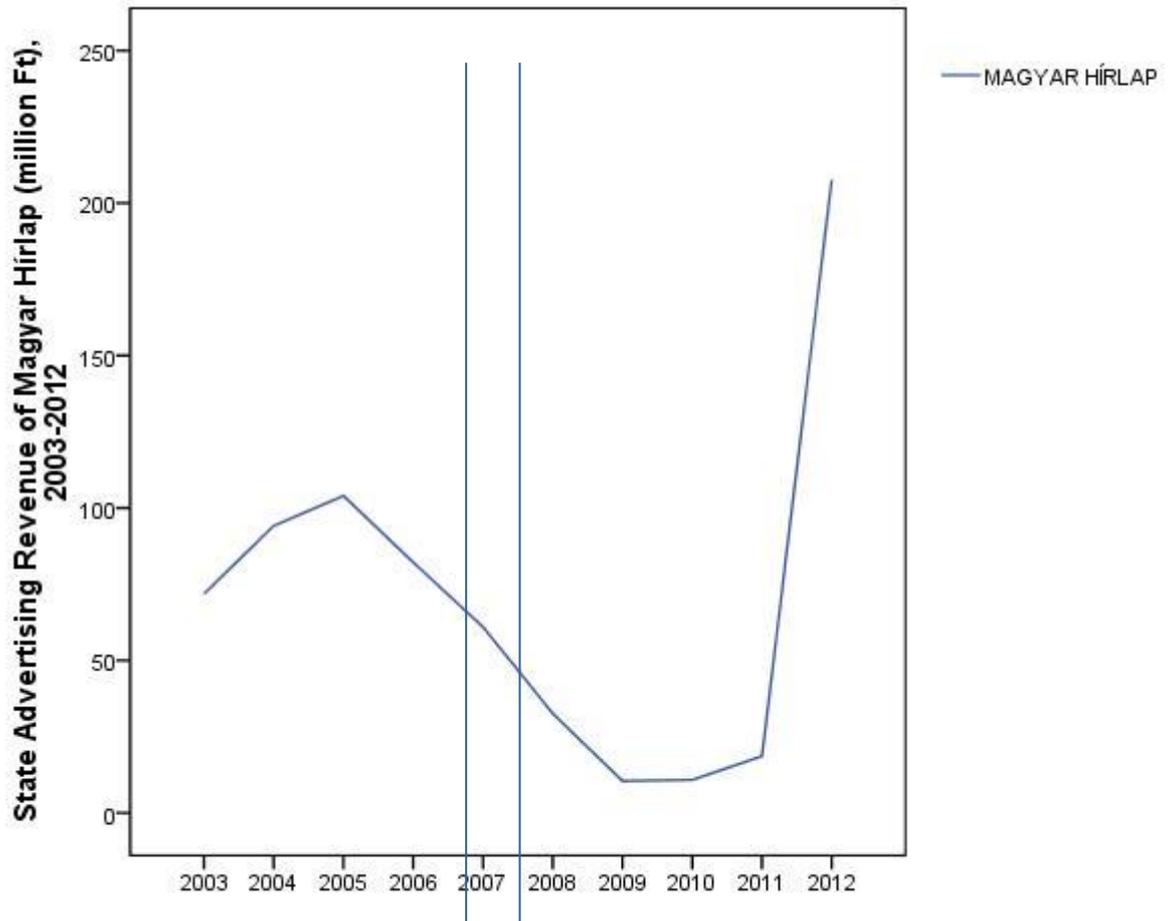


Source: calculations by the CRC CUB based on data from Kantar Media

The advertising revenue pattern of two largest civic and political newspapers (Figure 3.3) follows that of Figure 3.2. *Népszabadság* income already began to decline prior to the change in government, while the revenue of *Magyar Nemzet* began to grow only after the change in government.



Figure 3.4: State Advertising Revenue of Magyar Hírlap (millions Ft), 2003-2012



ownership structure and editorial changes

Source: calculations by the CRC CUB based on data from Kantar Media

The Magyar Hírlap is in a special situation in that its political orientation radically changed during the observation period and the editorial staff was almost entirely replaced, thereby enabling the paper to illustrate the politically influenced nature of state advertising orders. The vertical lines on figure 3.4 indicate the time when the owners and editors changed. It can be clearly seen that government advertising orders began to decline during the change in ownership and that advertising revenue for Magyar Hírlap from government and state enterprises only began to increase after the change in government in 2010.

**Table 3.5: Level of Political Influence based on the State Advertising Revenue of Civic Print Media**

Year	Amount spent on advertising appearing in political papers (millions Ft)	Amount spent on state advertising in political papers of the opposition (millions Ft)	Proportion of advertisements in opposition papers compared to all political papers, %
2003	970	184	18,9
2004	1.045	155	14,8
2005	1.501	307	20,5
2006	1.309	260	19,9
2007	1.453	485	33,4
2008	1.445	469	32,5
2009	1.131	379	33,5
Jan-Apr 2010	298	101	33,9
May-Dec 2010	507	234	46,2
2011	1.025	130	12,7
2012	1.280	118	9,2

Source: calculations by the CRC CUB based on data from Kantar Media

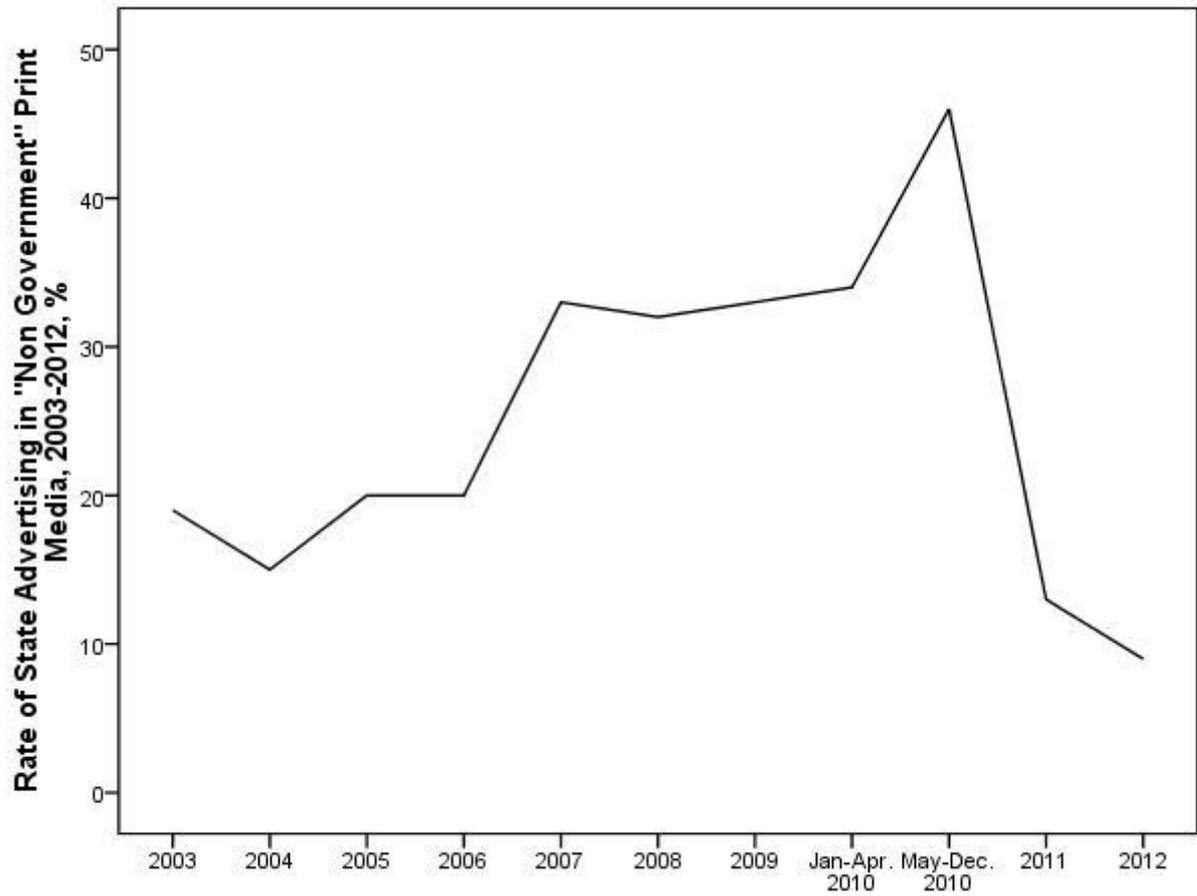
Note: *In 2010 there was a change in government, thus it's not possible to determine which papers are pro-government and which are opposition.

"Opposition" is understood to be that during the MSZP-SZDSZ and MSZP governments they were right-wing political papers, while under the FIDESZ-KDNP government it was left-wing papers.

For the measurement of the political influence of state media purchasers, we have created a simple guide. For each political paper, those that belong to either the left-wing or right-wing group were categorized. Between 2002 and 2010 we treated right-wing newspapers as 'the opposition' and left-wing ones as 'government supporters', and after May 2010 vice-versa. We then compared the proportion of opposition newspapers purchased advertisements with that of all advertisements purchased in all newspapers. As can be seen in Figure 3.6., between 2003 and 2006 the rate was around 20%, while between 2007 and 2009 it increased to 30%. A very high value could be observed in the second half of 2010. The proportion fell strongly back in 2011 and the lowest value obtained was in 2012.



Figure 3.6: Rate of State Advertising in “Non Government” Print Media, 2003-2012, %



Source: calculations by the CRC CUB based on data from Kantar Media



4. Summary and Next Steps

Our brief analysis shows that media purchases by Hungarian government institutions and state-owned companies from 2003-2012 were demonstrably influenced by political considerations.

The results underscore that over the period in review a highly concentrated structure of government advertising expenditure was implemented: one or two organizations accounted for half of all payments while the 10 largest clients make up 3/4 of all spending. Within state advertising expenditure in the print media, a major part (25-40%) of advertising spending can be linked to newspapers with a clearly defined political profile.

Meanwhile, the entire period under review was characterized by governments 'rewarding' the press which was close to them by having state institutions and state-owned companies purchase advertising space in these media products. Changes in advertising spending in the left-wing and right-wing print media very accurately follow changes in government. We consider this phenomenon as an important aspect of state advertising expenditure in this regard.

Our measurements on the political influence of state spending were significant throughout. The most pluralistic example of state spending was observed in the middle of the period (2007-2009), while the most pro-government direction was appropriately in 2004 and 2011-2012.

The increased advertising revenue from public funds of daily newspapers and weekly magazines close to the governing parties is not only of concern for the survival of diverse political journalism. The media's role is to explore, and thus discourage corruption. The ability to fulfill this role has been carefully limited thanks to political influence on the media.

In a market in which there is a high concentration on the buyers' side, in our case the government, or the purchase of advertising space by a couple of state or private companies has a large weight on total advertising revenues, and advertising revenue represents a high proportion of total revenue, media players necessarily become dependent on big customers. This dependence can impede the free functioning of the media. This relationship is best



studied through the analysis of additional content. The content of certain media outlets can be observed: what issues they write about, what issues they "forget about", and to what extent and tone does the government, or private companies, deal with certain sensitive topics.⁷

A further step in this research, therefore, will be to establish a database that contains both the advertising expenditures of state institutions and state-owned enterprises as well as data on the content characteristics of the articles published in the given media product. This current database must therefore extend the content analysis of the data received and examine to what extent and how political influence prevailed.

As an additional step in this research, we need to connect the database containing state advertising expenditure to the CRC CUB built by the Hungarian Public Procurement Database (MaKAB), in which the latter also contains data for the same period. Here we not only find a trace of yet uncovered corrupt transactions in the media, but the analysis method will give an opportunity to examine the assumed relationship between government influence of the press and the role played by the press in revealing the phenomena of corruption.

⁷ Such a research program is easy to implement with the help of quantitative content analysis. One such tool is the Textplore online text analysis software developed in Hungary (<http://textplore.org>).



Appendix

List of state clients and publishers studied

State Clients	Publishers
1 ADÓ PÉNZÜGYI ELLENŐRZÉSI HIV.	2 ZSIRÁF
2 ÁLL.FOGLALKOZTATÁSI SZOLGÁLAT	A MÁSODIK PRODUKCIÓ KFT.
3 ÁLL.PRIVATIZÁCIÓS VAGYONKEZ.RT	A.MH KIADÓI KFT.
4 ÁLLAMADÓSSÁGKEZELŐ KÖZPONT	ABSOLUT MÉDIA KFT.
5 ÁLLAMI AUTÓPÁLYA KEZELŐ KHT.	ACTIVE VERLAGS LAPKIADÓ KFT.
6 ÁLLAMI BANKFELÜGYELET	ADOC-SEMIC KIADÓI KFT.
7 ÁLLAMI SZÁMVEVŐSZÉK	ADY ENDRE SAJTÓALAPÍTVÁNY
8 BELÜGYMINISZTERIUM	AGROINFORM
9 BM.TÜZOLTÓSÁG	AHEADMEDIA KFT.
10 BP.FESZTIVÁLKÖZPONT KHT.	AKADÉMIA KIADÓ KFT.
11 BUDAPEST ÖNKORMÁNYZAT	ÁLOMHÁZ - ÁLOMKERT KFT.
12 BUDAPEST V.KER.ÖNKORMÁNYZAT	AQUA MÉDIA KFT.
13 BUDAPESTI VÁROSÜZEMELTETÉSI KP	ARANYPÉNZ
14 DESIGN TERMINÁL KFT.	AUTOMOTIVE PRESS KFT.
15 DESIGN TERMINÁL KHT.	AUTO-NEWS
16 DIÁKHITEL KÖZPONT RT.	AXEL SPRINGER-BUDAPEST
17 DÍJBESZEDŐ RT.	AXEL SPRINGER-MAGYARORSZÁG
18 EGÉSZSÉGÜGYI MINISZTERIUM	BABA MAGAZIN KIADÓI KFT.
19 egyéb hirdeto	BABAINFO MÉDIA KFT.
20 ERIC-EURORÉGIÓS INFORMÁCIÓS KP	BUDAPEST WEEK P.
21 EU MUNKAVÉDELMI ÜGYNÖKSÉG	BUDAPESTI PIAC
22 EURÓPAI BIZOTTSÁG	BURDA MAGYARORSZÁG KFT.
23 FÖLDMŰVELÉSÜGYI MINISZTERIUM	CAMION TRUCK & BUS
24 FVM AGRÁRMARKETING CENTRUM	CANDOVER KFT.
25 GAZDASÁGI ÉS KÖZLEKEDÉSI MIN.	CASH FLOW KIADÓ
26 GAZDASÁGI VERSENYHIVATAL	CELSUS KFT.
27 HÍRKÖZLÉSI FELÜGYELET	CENTRAL-PRESS BUDAPEST KFT.
28 HONVÉDELMI MINISZTERIUM	CRIER MÉDIA MAGYARORSZÁG KFT.
29 HUNGAROFEST KHT.	DINGÓ KFT.
30 IFJÚSÁGI ÉS CSALÁDÜGYI MIN.	EDITORIAL KFT.
31 IFJÚSÁGI ÉS SPORTMINISZTERIUM	ELITE MÉDIA ÉS MARKETING GROUP KFT.
32 IGAZSÁGÜGYI ÉS RENDÉSZETI MIN.	EMELKA LAPKIADÓ KFT.
33 IGAZSÁGÜGYI MINISZTERIUM	ESOTERA KFT.
34 INFORMATIKAI ÉS HÍRKÖZLÉSI MIN	ÉTEK PRESS KFT.
35 KINCSTÁRI VAGYONKEZELŐ SZERV.	EVISION KFT.
36 KÖNYVTÁRELLÁTÓ KHT.	F.S.E. PRESS KFT.
37 KÖRNYEZETVÉD. ÉS VÍZÜGYI MIN.	FIDELIO MÉDIA KFT.
38 KÖRNYEZETVÉDELMI TER.FEJL.MIN.	FILMVILÁG ALAPÍTVÁNY
39 KÖZIG.ÉS IGAZSÁGÜGYI MIN.	FUVOSZ
40 KÖZL.HÍRKÖZLÉSI VÍZÜGYI MIN.	G.F.H. KIADÓ KFT.
41 KÖZPONTI STATISZTIKAI HIVATAL	GALENUS LAPKIADÓ KFT.



Print media expenditure of government institutions...

42	KULT.ÖRÖKSÉGVÉDELMI HIVATAL	GASZTROMÉDIA KFT.
43	KÜLÜGYMINISZTERIUM	GENERÁLMEDEXPRAXIS BT.
44	M.GAZDASÁGFEJLESZTÉSI RT.	GEOMÉDIA LAP- ÉS KÖNYVKIADÓ
45	M.NEMZETI ÜDÜLÉSI ALAPÍTVÁNY	GEOPRESS KIADÓ
46	M.NEMZETI VAGYONKEZELŐ ZRT.	GRABOWSKI KIADÓ KFT.
47	MAGYAR AGRÁRKAMARA	GUSTO PRODUCTION MAGYARORSZÁG KFT.
48	MAGYAR ÁLLAMKINCSTÁR	HAMU ÉS GYÉMÁNT MAGAZINKIADÓ KFT.
49	MAGYAR ÁLLAMVASUTAK	HASZON LAPKIADÓ KFT.
50	MAGYAR ÉPÍTÉSZ KAMARA	HEILING MÉDIA KFT.
51	MAGYAR FEJLESZTÉSI BANK RT.	HERENDI PORCELÁNMANUFAKTÚRA RT.
52	MAGYAR GYÓGYSZERÉSZ KAMARA	HETI REVÜ KFT.
53	MAGYAR NEMZETI BANK	HETI VÁLASZ LAP -ÉS KÖNYVKIADÓ
54	MAGYAR POSTA	HÍDRÁDIÓ KFT.
55	MAGYAR TÁVIRATI IRODA	HÍRTŐZSDE HOLDING RT.
56	MAGYAR TURIZMUS RT.	HÓCIPIŐ
57	MAGYAR VILLAMOS MŰVEK RT.	HUNGA-COORD SAJTÓIRODA
58	MEGYEI KORMÁNYHIVATAL	HVG KIADÓ ZRT.
59	MILLENÁRIS	IDG MO-I LAPKIADÓ
60	MINISZTERELNÖKI HIVATAL	IMN HUNGARY KFT.
61	MTVA	IMP NEMZETKÖZI ORVOSI KIADÓ KFT.
62	MUNKAÜGYI MINISZTERIUM	INFORM MÉDIA KFT.
63	MŰVÉSZETEK PALOTÁJA	INFROPINT KFT.
64	NEMZ.ÉLELMISZERLÁNC-BIZT.HIV.	IQ PRESS KIADÓ
65	NEMZ.FEJLESZTÉSI ÉS GAZD.MIN.	IT-BUSINESS KFT.
66	NEMZ.FENNTARTHATÓ FEJL.TANÁCS	JÁNOSSY KIADÓ
67	NEMZ.INFRASTRUKTÚRA FEJL.ZRT.	JETMEDIA
68	NEMZ.MÉDIA- ÉS HÍRKÖZL.HATÓSÁG	JOBBI NÉGYES PÁHOLY KFT.
69	NEMZETGAZDASÁGI MINISZTERIUM	JUPITER KFT.
70	NEMZETI ADÓ-ÉS VÁMHIVATAL	KALANGYA KFT.
71	NEMZETI CSALÁD-ÉS SZOC.POL.INT	KINCSPROGRAM KFT.
72	NEMZETI ERŐFORRÁS MINISZTERIUM	KJ PUBLISHING KFT.
73	NEMZETI FEJLESZTÉSI HIVATAL	KORNÉTÁS KIADÓ KFT.
74	NEMZETI FEJLESZTÉSI MIN.	KOSSUTH KIADÓ KFT.
75	NEMZETI FELNŐTTKÉPZÉSI INTÉZET	KÖRNYEZETKULTURA KIADÓI KFT.
76	NEMZETI FOGLALKOZTATÁSI HIV.	KULINÁRIA KIADÓ KFT.
77	NEMZETI FOGYASZTÓVÉDELMI HAT.	KURENS PRESS MEDIA KFT.
78	NEMZETI FÖLDALAPKEZELŐ SZERV.	L&L COMMUNICATIONS
79	NEMZETI KÖZLEKEDÉSI HATÓSÁG	LAPCOM KFT.
80	NEMZETI KULTURÁLIS ALAP	LITERATURA MEDICA KIADÓ
81	NEMZETI KULTURÁLIS ÖRÖKSÉG MIN	M - MEDIEN GROUP
82	NEMZETI KÜLGAZDASÁGI HIVATAL	M&C CONSULTING KFT.
83	NEMZETI ÜDÜLÉSI SZOLGÁLAT KFT.	MAGAZIN MEDIA GROUP KFT.
84	NÉPJÓLÉTI MINISZTERIUM	MAGYAR FOTOGRAFIAI SZAKSAJTÓ ALAPÍTVÁNY
85	OKTATÁSI ÉS KULT. MINISZTERIUM	MAGYAR GYÓGYSZERÉSZETI TÁRSASÁG
86	OKTATÁSI MINISZTERIUM	MAGYAR HÍRLAP KIADÓI KFT.



Print media expenditure of government institutions...

87	ORSZ.FOGLALKOZTATÁSI ALAP.	MAGYAR KONYHA KIADÓ KFT.
88	ORSZ.KATASZTRÓFAVÉDELMI IGAZG.	MAGYAR KÖNYVKLUB
89	ORSZ.LAKÁS-ÉS ÉPÍTÉSÜGYI HIV.	MAGYAR MEDIPRINT SZAKKIADÓ
90	ORSZÁGOS BETÉTBIZTOSÍTÁSI ALAP	MAGYAR MEZŐGAZDASÁG
91	ORSZÁGOS RENDŐRFŐKAPITÁNYSÁG	MAGYAR NŐORVOSOK TÁRSASÁGA
92	ORSZÁGOS SZÉCHENYI KÖNYVTÁR	MAGYAR RÁDIÓ
93	ÖKO-PANNON KHT.	MAGYAR SZAKKIADÓ KFT.
94	ÖNK.TERÜLETFEJLESZTÉSI MIN.	MAGYARNARANCS.HU
95	ÖNKORMÁNYZATI MINISZTERIUM	MANAGER-MAGAZIN BUDAPEST KIADÓ KFT.
96	PÉNZÜGYI SZERVEZETEK FELÜGY.	MARKETINGPIRULA KFT.
97	PÉNZÜGYMINISZTERIUM	MARQUARD MEDIA MAGYARORSZÁG KFT.
98	PHARE PROGRAM-IRODA	MEDIA ID KFT.
99	POSTAAUTÓ BUDAPEST KFT.	MEDIACITY MAGYARORSZÁG KFT.
100	REGIONÁLIS IDEGENFORGALMI BIZ.	MÉDIAHÍREK KFT.
101	SZELLEMI TULAJDON NEMZETI HIV.	MEDIANOW KFT.
102	SZEMÉLYI-VAGYONVÉDELMI KAMARA	MEDICAL TRIBUNE KIADÓ KFT.
103	SZERENCSEJÁTÉK RT.	MEDICINA KÖNYVKIADÓ RT.
104	SZOCIÁLIS ÉS CSALÁDÜGYI MIN.	MELANIA KIADÓI KFT.
105	SZOCIÁLIS ÉS MUNKAÜGYI MIN.	MEZŐFÖLDI AGRÓFÓRUM
106	TERÜLETFEJLESZTÉSI TANÁCS	MEZŐHÍR MÉDIA KFT.
107	Total	MOTOR PRESSE KIADÓ
108	VÁLLALKOZÁSFINANSZÍROZÁSI ZRT.	MTG METRO GRATIS KFT.
109	VÁM-ÉS PÉNZÜGYŐRSÉG	MTI KIADÓ
110	VÁTI	NAPI GAZDASÁG KIADÓ
111		NEMZET LAP-ÉS KÖNYVKIADÓI KFT.
112		NÉPSZABADSÁG RT.
113		NÉPSZAVA KIADÓI KFT.
114		NEW WORLD PUBLISHING
115		NSZ 1999 LAPKIADÓ RT.
116		OFFICINA NOVA LAP-ÉS KÖNYVKIADÓ
117		ORSZÁGOS RENDŐRFŐKAPITÁNYSÁG
118		PANNON LAPOK TÁRSASÁGA
119		PATIKA TÜKÖR LAPKIADÓ
120		PENTHOUSE KFT.
121		PESTI EST KFT.
122		PESTI MŰSOR LAP- ÉS KÖNYVKIADÓ
123		PIAC ÉS PROFIT KIADÓ
124		PMC CONSULTING KFT.
125		PREMIER PÁHOLY KFT.
126		PRIM INF.-TECHNIKA
127		PRÍMA KONYHA KFT.
128		PROFESSIONAL PUBLISHING HUNGARY KIADÓ KFT.
129		QUALITY TRAINING STUDIO KFT
130		READER'S DIGEST KIADÓ
131		RF-HOBBY KFT.
132		RINGIER KIADÓ KFT.



Print media expenditure of government institutions...

133	RODIN MANAGEMENT SERVICE KFT.
134	SANOMA MEDIA BUDAPEST ZRT.
135	SANORG KFT.
136	SILVER KIADÓ KFT.
137	SOLTÉSZ REKLÁM KFT.
138	ST.PLUSZ
139	STAR-JOURNAL
140	SZABAD LAP KIADÓI KFT.
141	SZTÁR SPORT KFT.
142	TELEGRAF
143	TERMÉKMIX KFT.
144	TO HUNGARY LAPKIADÓ KFT.
145	TUDOMÁNY KIADÓ KFT.
146	VASÁRNAPI PLUSZ KFT.
147	VERLAG DASHÖFER SZAKKIADÓ KFT.
148	VERTIGO PUBLISHING KFT.
149	VH KFT.
150	VILÁGUTAZÓ KIADÓ BT.
151	VINCE MAGAZINKIADÓ KFT.
152	VITACOM KFT.
153	VIVA MÉDIA
154	VOGEL BURDA KFT.
155	VUM KFT.
156	WESTEL MOBIL RT.
157	ZÖLD ÚJSÁG KFT.
158	ZSIGMOND KFT.
