

Comparative analysis of data sources on the socio-economic position of autochthonous national minorities: a case study on minority Hungarians

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In Europe, there are some autochthonous national minority groups with a kin-state, and with significant numbers of populations in more than one country, under diverse political, social and economic conditions. Although there is much information on the political and minority rights status of these groups, their actual socio-economic positions compared to each other, to the titular ethnic groups or to the kin-state societies are relatively less studied. Statistical data offer an obvious solution for such comparative analyses. However, researchers often encounter difficulties demonstrating differences and similarities between the situations of such minority communities using quantitative indicators. Therefore, this study provides information on statistical data for quantitative research works aiming at a comparative analysis of the socio-economic positions of autochthonous national minority groups present in several countries. Focusing on minority Hungarians as a case study, we evaluated and compared the main relevant data sources, providing an overview of their most important features. In addition to census data, we presented the related major international large-scale surveys and the main surveys aimed at exploring the socio-economic situation of minority Hungarians.

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Introduction

The socio-economic asymmetries and inequalities affecting ethnic minority groups have been presented in numerous studies. The origin of their minority status is one major characteristic that significantly determines the socio-economic conditions of minorities. The classic typology differentiates three major types: indigenous populations resulting from colonization, immigrant minorities based on voluntary or forced migration and regional and national minorities developed during nation-building processes (Horváth 2006).

Regional and national minorities are known as autochthonous minorities and include people who became a minority in their homeland because of the changes in state borders and other historical events (FÜEN 2006). In many European countries, especially Central and Eastern Europe, the issue of autochthonous national minorities remains unresolved (Tárnok 2016). Because of various ethnic-related asymmetries present in their countries, these minority groups continue to face numerous social and economic disadvantages (Csata 2017). However, the literature on ethnic asymmetries only marginally focuses on autochthonous national minorities, with a significant part focusing on immigrant minorities (Csata et al. 2024).

Among autochthonous national minorities, groups with a kin-state are in a special position because kin-state policies (including support policies) often significantly determine the opportunity structures of these minority groups, directly impacting their socio-economic conditions (Waterbury 2010). In several Central and Eastern European countries, there are some autochthonous ethnic minority groups with a kin-state (e.g. Russians, Serbs or Hungarians), with significant populations under very diverse political, social and economic conditions.

Although some aspects of these conditions (such as political relations or minority rights status) are considered to be well explored, the socio-economic characteristics of these minority groups are relatively less known (Kántor 2016, Cârstocea 2018). Moreover, although some studies have provided a comparative analysis of certain socio-economic features of such minority groups, only a few have provided a comprehensive view. Studies comparing the socio-economic positions of the same ethnic group living in different countries are even less common, especially in relation to the majority populations or the kin-state societies.

The main reason for this gap in knowledge is that researchers face many difficulties when comparing the socio-economic positions of these minority communities using public statistical databases. The range of available data on the subject may differ in each country concerned, and even similar types of data may exhibit significant differences in their main characteristics from country to country. Therefore, it is important to identify and analyse the possible data sources that can be used to conduct a quantitative and comparative study on the socio-economic positions of

autochthonous national minority groups in several countries where such minority groups are present in significant numbers.

This topic is too broad to be comprehensively analysed in a study such as this. Moreover, the number of relevant minority groups is large, and the databases and studies to be potentially examined are likely to be available in many languages. Therefore, this study only aims to identify and analyse the possible data sources for the comparative analysis of one certain autochthonous national minority group with the above characteristics.

In Europe, one of the largest autochthonous national minority communities is Hungarians, comprising approximately 2 million people. Furthermore, minority Hungarians can even be considered the largest minority community in Europe compared with the population of its kin-state, Hungary (approximately 10 million). Every neighbouring country of Hungary has a native ethnic Hungarian community. In four such countries, more than 100,000 ethnic Hungarians are concentrated in certain historical regions: Transylvania in Romania, the Southern areas of Slovakia, Vojvodina in Serbia and Transcarpathia in Ukraine.

Therefore, we identified, evaluated and compared the main relevant data sources on the socio-economic conditions of minority Hungarians in four of Hungary's neighbouring countries and provided an overview of their most important features.

Methodology

We intend to provide information on statistical data for quantitative research studies aiming to comparatively analyse the socio-economic positions of autochthonous national minority groups with a kin-state and present in several countries. To this end, we first provided an overview of the relevant literature on the socio-economic conditions of the four populous minority Hungarian communities as a case study, with special reference to their geographic scope, data sources and the main indicators analysed. As this study focuses on statistical data including socio-economic and ethnic information (hereafter referred to as ethnically differentiated statistical data), the overview primarily evaluated studies involving such type of data sets published in the past 20 years. However, we also presented important studies using different methodologies in some cases.

At the same time, there are a number of other autochthonous national minorities in Europe with a kin-state who are present in several countries in significant numbers under considerably diverse political, social and economic conditions. Although it is difficult to comprehensively analyse all the relevant autochthonous national minorities, this study identifies a few studies regarding certain socio-economic characteristics of some other autochthonous national minority groups.

We then evaluated and compared the main relevant available public data types and sources on ethnic Hungarian communities regarding Hungary and the four

neighbouring countries concerned. To properly explore the socio-economic conditions of ethnic minority communities, we ensured that the population's socio-economic data could be classified according to the main ethnic characteristics (nationality or mother tongue). Consequently, we analysed the applicability of those datasets that reflect the direct information of persons (ethnically differentiated statistical data): census data of the countries concerned, the most relevant standardized international large-sample surveys; and other surveys conducted specifically on the socio-economic situation of minority Hungarian communities.

However, if there are no available relevant ethnically differentiated data, then data on administrative-territorial units can also indirectly reflect the socio-economic situation of the areas inhabited by ethnic minorities. Moreover, territorially labelled indicators can be even more abundant. However, territorial units with mixed ethnicity reduce the usability of territorial data for the socio-economic analysis of specific ethnic minorities. In addition, owing to various territorial indicators and data collecting methods of the different countries concerned, comparative studies using data on territorial units in different countries inhabited by the same ethnic minority have strong constraints (Borbély et al. 2022).

In addition to the aforementioned datasets, there are other national-level thematic data sources (typically on the educational system or the corporate registers) that can be used to refer to the socio-economic position of minorities. However, we do not use these data sources for two reasons. First, these data sources only indirectly refer to ethnic characteristics, warranting numerous additional analyses to unlock and identify it, for example to identify firms with a Hungarian background among the registered ones. Second, in other cases, the possible data sources are highly country-specific (see the detailed Romanian educational datasets), which cannot support a comparative study among minority communities living in different countries. Therefore, we only focused on data sources with clear, direct ethnic differentiation possibilities.

Main features of some formal research on the topic

Formal research on minority Hungarians

In the Hungarian literature, minority Hungarians or the regions they inhabit are popular research topics, with constantly growing academic activity over the last 30 years. For example, researchers have comprehensively and systematically explored the basic demographic features and processes of the minority Hungarian communities based on the censuses of the neighbouring countries of Hungary (Gyurgyík et al. 2010, Kiss 2012, Kapitány 2013). Census data from Hungary could also systematically reflect some important patterns of the neighbouring Hungarian minority communities (Tóth–Kincses 2011, Kincses–Tóth 2020, Kincses–Bálint 2016, Péti et

al. 2017) because of the ethnocentric migration of Hungarian minority communities from their original homeland to the kin-state (Péti et al. 2021). Census data were also applied in other demographic analyses (Kapitány 2015, Tóth 2018) and population forecasts (Hablicsek et al. 2005, Péti et al. 2020).

However, comparative studies explicitly aimed to capture the socio-economic position of minority Hungarians have been less numerous, according to literature reviews (Gyurgyík et al. 2010, Borbély 2020). Nevertheless, we can find some studies examining the social stratification or certain socio-economic characteristics of minority Hungarians based on ethnically differentiated statistical data.

Most of the studies of this kind deal with only one country or region, comparing the conditions of the Hungarians to those of the majority society. Related to the first two census years of the millennium (2001/2002 and 2011), the majority of these studies focus on Romania (or the region of Transylvania) and its Hungarian population (Veres 2006, Papp 2008, Kiss 2010a, 2010b, 2014, Veres 2014, 2015, Csata 2017). We can also find some socio-economic analyses of the Hungarians in Slovakia (Gyurgyík 2005, 2006, 2008) and the Vojvodina region of Serbia (Badis 2008). Regarding Transcarpathia region of Ukraine, detailed analysis of ethnically differentiated socio-statistical data on the region has not yet been carried out even if there are several examples of ethno-demographically focused studies of the region using the most recent census data from 2001 (Molnár–Molnár 2005, Dupka 2011, Molnár 2013, Tátrai et al. 2019), as well as studies on some certain aspects of the socio-economic situation of its Hungarian population (Kovály et al. 2017).

Although most of these ethnically focused research of a region also includes some spatial differentiation, they usually give only a brief socio-statistical analysis of mid-level administrative-territorial units (districts, counties). Because of the gaps in data availability, only a small number of ethnically focused studies contain detailed (local level) spatial differentiation (Badis 2008, Gyurgyík 2006, 2008) regarding only a few basic indicators. For example, it is still very difficult in Romania to obtain ethnically differentiated census data on a territorial level lower than the NUTS 3 (county) level.

Despite all these shortcomings, some studies are focusing specifically on the spatial characteristics of minority Hungarians in Transylvania, examining the connection between the proportion of Hungarians and the socio-economic position of the areas. A study on Romania's small and medium-sized towns suggested that the living standards of those with a Hungarian majority were above the national average (Megyesi–Péti 2019). Meanwhile, another study found that the weakening position of Hungarians in Transylvania was closely related to the gradual concentration of the Hungarian population in areas where they were in relative majority because these areas tended to be less urbanized, had poorer infrastructure and were economically less developed (Kiss 2014). However, another study also raised the possibility that this demographic concentration of Hungarians could have some positive effects as well, such as lower transaction costs due to increased social solidarity, ethnic regional

identity and, as a comparative economic benefit from these, the emergence of competitive ethnic businesses and ethnic marketing (Csata 2019).

In addition to studies focusing on only one region, just a few ethnically focused studies examined some of the socio-economic characteristics of minority Hungarians with the same methodology in more or all countries concerned. These studies typically worked with census data, comparing the demographic situation of Hungarian communities and describing their social positions along certain indicators such as educational attainment and occupational status (Gyurgyík et al. 2010, Kiss 2012).

Some studies on the topic used case-by-case survey data targeting the most populous minority Hungarian communities. However, only a few surveys have been conducted in the last 20 years that were representative not only of the population of Hungary but also of each of the four most populous minority Hungarian communities in the neighbouring countries, providing a comprehensive assessment of the socio-economic characteristics of the whole communities.

The Ethnic-National Minority Research Institute of the Hungarian Academy of Sciences conducted one of these surveys in 2007 (see *'Kárpát Panel 2007'*). The lead researchers of this panel survey presented the main results of the first and the second waves (Papp–Veres 2007, 2012). The Research Institute for National Strategy implemented other comprehensive surveys on the five most populous ethnic Hungarian communities in 2018 (see *'Életminőség és jólét 2018'*; in English: *'Quality of life and well-being 2018'*, hereafter referred to as: *ÉMJ 2018*). Some results of this survey were published by the researchers of the survey (Csata et al. 2021b, Péti et al. 2021).

Another study group used data from other thematic case-by-case surveys targeting certain groups of the most populous Hungarian minority communities. Most notable examples include the studies exploring the situation of young minority Hungarians (Mozaik2001, Mozaik2011, GeneZYs2015, Ifjúság2016, Ifjúság2020) and the connections between the national identity and media consumption habits of minority Hungarians (Dobos 2012, Dobos–Megyeri 2014).

Formal research on other European national minorities

Apart from minority Hungarians, numerous other large autochthonous national minority groups in Europe have a kin-state, such as minority Russians, who are present in many post-Soviet successor states neighbouring Russia; Serbians in Bosnia and Herzegovina, Croatia, Kosovo and Montenegro; Romanians in Moldova and Ukraine; Turks in Bulgaria; the Swedish population in Finland and the German-speaking population in Italy.

These minority groups are also characterized by diverse social and economic conditions, and their socio-economic positions are considered a less focused topic academically than their political and minority rights status (Kántor 2016, Cârstocea 2018), similar to the case of minority Hungarians. However, to lay the foundations for a possible later comparative literary analysis, we also identified a few English-

language studies regarding certain socio-economic characteristics of some autochthonous national minority groups in Europe.

Regarding population size, the largest autochthonous national minority community in Europe comprises minority Russians, with ~10 million people defining themselves as of Russian nationality or speaking Russian as the native language. A vast majority of minority Russians live in Ukraine. By contrast, according to the latest censuses, there are ~2 million autochthonous Russian population in six other European countries (Estonia, Latvia, Lithuania, Belarus, Moldova and Transnistria), with more than 100,000 Russian inhabitants in each country. Given the political and social changes in these countries over the past decades, a comparative analysis of the socio-economic situation of minority Russians is an extremely relevant and focused topic nowadays.

One example to compare the socio-economic positions of two or more minority Russian groups in several European countries is Roger Brubaker's (2011) work that analyses the conditions of Russian populations in the nationalizing states of the Post-Soviet Estonia, Latvia, Ukraine and Kazakhstan, mainly from an ethnopolitical perspective. Although the study explores the ethnopolitical and linguistic aspects and processes of the situation of Russian minorities in detail, it does not aim to give a socio-economic analysis, as it analyses only the basic ethno-demographic segments of census data. The study, however, as a factor of socio-economic conditions, details the most important facts about the language skills (majority language, Russian and English) and language use (differences between mother tongue and preferred language) of the populations, concerning nationality.

Moreover, some studies explicitly use quantitative information to analyse certain aspects of the socio-economic situation of two or more minority Russian communities. One of them explores the influence of language proficiency on the dynamics of labour market entry among young Russians and the native populations by comparing the situation of Estonia and Ukraine and analysing data from the *Estonian Integration of the Second Generation in Europe (TIES)* survey and the *Youth Transition Survey* in Ukraine (Lindemann–Kogan 2013). Another study tries to grasp the ethnic characteristics of social exclusion in Estonia and Latvia, analysing data on ethnicity, citizenship, educational attainment and employment status from the *Norbalt* surveys (Aasland–Fløtten 2001).

Some studies examine the socio-economic situation of a minority Russian community in only one country, comparing it to the situation of the titular ethnicity. As can be seen from the comparative analyses on more countries, the conditions of Russians in Estonia are clearly the best explored among minority Russians: their relative position, especially their social disadvantages due to lack of knowledge of Estonian language, is addressed in several studies using different data sources. The conditions of the minority Russians in Estonia are most comprehensively described in a study about the language disadvantages of the Russian population, analysing

ethnic data from the last Soviet (1989) and the two subsequent Estonian (2000 and 2011) censuses (Włodarska-Frykowska 2016).

Another study analyses the ethnic inequalities in the Estonian labour market, examining the relationships between ethnicity, Estonian language proficiency, educational attainment and occupational status in the first job. The study focuses on the labour market entry conditions of Estonian and Russian students aged 15–26 using ethnic microdata from the *EU-LFS* survey collected in Estonia between 1995 and 1997 and between 2002 and 2006. The regression analysis results show that although investing in country-specific human capital benefits Russian youth, even those who speak Estonian well are less successful in entering the labour market than ethnic Estonians (Lindemann 2009). This coincides with the result of a study based on the Estonian *TIES* survey that shows differences between the educational attainment level of young Estonians and second-generation Russians (Lindemann–Saar 2011).

We also found a comparative analysis of the socio-economic position of the Turkish minority in Bulgaria, estimated to include approximately 600,000 people according to the 2011 census. Their weak socio-economic conditions are illustrated in a study analysing data on educational attainment from the 1992 and 2011 Bulgarian censuses (Liakova 2013).

The socio-economic conditions of autochthonous national minorities in Western Europe substantially differ from those of minorities in Central and Eastern Europe because of historical reasons, as confirmed by many empirical studies. For example, a study explored why Swedes in Finland have higher educational attainment rates than Finns, mainly by analysing long-term census microdata (Saarela–Finnäs 2003). Another study compared the socio-economic conditions of the German, Rhaeto-Romanic and Italian-speaking populations in the Autonomous Province of Bolzano, South Tyrol, Italy (Haller 2006).

Comparative analysis of ethnically focused data sources

Census data

Censuses are the most important sources of data to examine the basic socio-economic characteristics of the population, as they are high-reliability surveys with generally similar methodologies in each country, surveying basic socio-economic characteristics of the entire population and being repeated periodically, usually every 10 years. In connection with the latter, Ukraine is the only exception from the countries with a significant Hungarian population, where the latest national census was held in 2001. In the other four countries concerned, censuses have been conducted every 10 years during the last decades, at more or less the same times in each country.¹

¹ Hungary: 1990, 2001, 2011, 2022; Slovakia: 1991, 2001, 2011, 2021; Romania: 1992, 2002, 2011, 2022; Serbia: 1991, 2002, 2011, 2022.

Censuses usually record ethnicity (nationality and/or mother tongue), thus data on persons with Hungarian ethnicity and language can be filtered out from the databases. However, these ethnic variables usually appear separately in publicly available databases and are not linked to other socio-economic data. Detailed census microdata are only purchasable for research purposes, making it possible to link ethnic and socio-economic data. For example, many census microdata with ethnic variables are publicly accessible online via the IPUMS-I database [1].

During the last censuses, ethnic data were also being recorded in every country with populous Hungarian minority communities, which theoretically makes it possible to compare the basic socio-economic characteristics of different ethnic groups.² Researchers, however, can face difficulties when purchasing microdata because of uneven bureaucratic procedures.

In addition to ethnic data acquisition, its interpretation requires special care, even in the case of traditional censuses (Kapitány 2013). For example, nationality and mother tongue data were recorded and processed using different methodologies from country to country. In most cases, questions on ethnicity were not even required to be answered, resulting in a relatively high non-response rate. It is also important that during the censuses, the citizens declare their ethnicity in a certain political and linguistic environment, which in some cases may lead to them hiding their real ethnic identity (Csata et al. 2021a).

Until the last censuses, this did not cause significant problems in studying minority Hungarians. However, during the 2021–2022 censuses of the neighbouring countries of Hungary, hundreds of thousands of residents of presumably Hungarian origin (together with millions of majority residents) left the question of nationality and mother tongue characteristics blank, causing significant problems in interpreting the results. In addition, the methodology of recording ethnicity can change even within a country from one census to another, causing difficulties in long-run comparative studies. For instance, unlike before, the Slovakian census in 2021 could record two possible ethnic affiliations of a person (one primary and one secondary nationality).

Another problem is that in the neighbouring countries of Hungary, Hungarians with Roma/Gypsy descent frequently declare themselves untraceable Roma, Hungarian or the titular ethnicity, and the declaration of their ethnic identity may alter between two consecutive censuses (Papp 2012). Miscounts appear most likely in urban, ethnically diverse and economically poor localities (Csata et al. 2021a). Even half of the respondents presumably of Roma/Gypsy descent (considered Roma by the environment) declared themselves not to be Roma but be the titular ethnicity or Hungarian (Braun et al. 2010, Papp 2012).

² It is important to see that the possible spread of the so-called register-based censuses (transferring data from the population register not applying surveys) in the Central and Eastern European region may cause that ethnic census data will no longer be available in the near future. This is what already happened in 2011 with the register-based censuses of Austria and Slovenia. Since then, the number of native ethnic Hungarians has not been recorded in these countries.

In addition to ethnic differentiation, another major advantage of censuses is that they allow detailed territorial differentiation. However, census data are not publicly available at settlement levels in many Central and Eastern European countries (e.g. Serbia, Romania, Croatia, Slovenia and Austria), which hinders detailed territorial analyses. Moreover, the availability of census data that allows ethnic and detailed spatial differentiation is very limited.

International survey data

In addition to censuses, large-scale international surveys can be useful when examining the socio-economic conditions of minorities. From thematic, methodological and spatial aspects, six international surveys are considered relevant to minority Hungarians. Herein, we briefly present the main characteristics of these six surveys and their possible role in examining the socio-economic situation of Hungarian minorities.

1. The European Union Labour Force Survey (EU-LFS) ([2], [3], [4]) has been measuring the economic activity and labour market characteristics of the European Union's population 15 years of age and over since 1983. It is based on household sampling and has cross-sectional and longitudinal versions on a quarterly and annual basis. It has been conducted in Hungary, Slovakia and Romania since the second half of the 1990s and in Serbia since 2014. Ukraine is not involved. In the four countries concerned, EU-LFS is based on a stratified sampling method with an average sample size of tens of thousands [5].
2. The European Union Statistics on Income and Living Conditions (EU-SILC) ([6], [7], [8]) has examined the quality of life of the European Union's population 16 years of age and over since 2004, mainly regarding income, living conditions, poverty and segregation. The longitudinal version of the survey tracks changes over 4 years in approximately 100,000 households (and 210,000 individuals). Approximately 135,000 households (280,000 people) are surveyed annually during the cross-sectional version. EU-SILC has been surveyed in Hungary, Slovakia and Romania since the mid-2000s, and in Serbia since 2012, with an average sample size of around approximately 10,000 in each country [9]. Ukraine is not involved in this survey either.
3. The European Health Interview Survey (EHIS) ([10], [11], [12]) examines the health status and problems of the European Union's population over the age of 15 years and its effects on individuals and communities approximately every 5 years, using a two-stage stratified sampling procedure. Hungary, Slovakia and Romania participated in all three survey waves, whereas Serbia joined the latest wave in 2019 for the first time. The average sample size was a few thousand in each country; hence, it cannot be used specifically to study the situation of Hungarian minorities by itself.

4. The European Social Survey (ESS) [13] has been conducted every 2 years since 2002 from 2020, focusing on the European population's demographic and social conditions, political and public preferences and the changes in its attitudes and values. In addition to the permanent questions in the survey, there are always some specific issues differing from wave to wave (2008 – attitudes towards ageing and welfare systems; 2010 – connection between work, family and well-being; 2012 – attitudes towards well-being and democracy and 2014 – migration and health conditions). Although nationality and mother tongue are officially included in the ESS questions, the average sample sizes do not allow us to make valid statements specifically on Hungarian minorities. However, the survey did not have a wave in which all the examined countries participated, as Serbia, for example, only joined in 2018. Nevertheless, some survey waves (R2–R6) were also recorded in Ukraine.
5. The European Values Study (EVS) [14] is officially held every 9 years, primarily measuring the value preferences of the population in the countries surveyed. Efforts have been made to harmonize the national surveys for each wave of the survey methodologically and in terms of time. However, in some cases, there are multi-year differences between the recording dates in some countries. The survey was launched in 1981 with the participation of 10 countries, and the Central and Eastern European countries gradually joined in 1990. The first wave, and so far the only wave in which all the countries concerned were included, was recorded in 2008. The fifth wave of the survey took place in 2018 in most of the examined countries, except in Ukraine, where a separate survey was recorded at the end of 2020. In the case of EVS, the average sample size was only a few thousand in each country; therefore, its data cannot be used specifically for researching the Hungarian minorities. However, the EVS is in a privileged position among the large-scale international surveys regarding Hungarian minorities, being the first international survey under which data collection was carried out specifically for a Hungarian minority community (the Hungarians in Transylvania) [15]. As part of the fifth wave of EVS, the survey collected data in 15 counties of Transylvania. This special survey can also be a good example of other initiatives aiming to assess the characteristics of Hungarian minorities within the framework of a given international survey.
6. World Value Survey (WVS) [16] was launched as an international counterpart to EVS with a scope on non-European countries, but it currently operates as a separate data collection with a partly different methodology. The WVS is closely related to the work of Ronald Inglehart, who developed his comprehensive theory on value change in countries around the world based on WVS data (Inglehart 1997). Within the WVS framework, data collection has taken place in seven waves so far, with the changing participation of countries. There were two waves in which all of the examined countries participated: the

third wave between 1995 and 1998 and the seventh wave between 2017 and 2021. Similar to the EVS, the WVS also works with a sample size of a few thousand, so its data are not suitable for researching the situation of Hungarian minorities either.

The advantage of international surveys is that they are planned and coordinated by organizations with cross-national responsibilities. This usually means that the methodology for a given survey is almost identical from one country to another, which, on the one hand, guarantees the comparability of data collected in different countries and, on the other hand, in the best case, guarantees the high quality and reliability of the databases. Their regularity varies, but they are carried out more frequently than censuses. However, only two surveys were conducted systematically in all five countries (Table 1).

Table 1

Years of large-scale international questionnaire surveys

Country	Large-scale international questionnaire survey					
	EU-LFS	EU-SILC	EHIS	ESS	EVS	WVS
Hungary	1996–2024	2005–2024	2009 (W1), 2014 (W2), 2019 (W3)	2002–2020 (R1–R10)	1990 (W2), 1999 (W3), 2009 (W4), 2018 (W5)	1981 (W1), 1998 (W3), 2009 (W5), 2018 (W7)
Romania	1997–2024	2007–2024	2008 (W1), 2014 (W2), 2019 (W3)	2006–2008 (R3–R4), 2018 (R9)	1990 (W2), 1999 (W3), 2008 (W4), 2018 (W5)	1998 (W3), 2005 (W5), 2012 (W6), 2018 (W7)
Slovakia	1998–2024	2005–2024	2009 (W1), 2014 (W2), 2019 (W3)	2004–2012 (R2–R6), 2018–2020 (R9–R10)	1990 (W2), 1999 (W3), 2008 (W4), 2018 (W5)	1990 (W2), 1998 (W3), 2018 (W7)
Serbia	2014–2024	2012–2024	2019 (W3)	2018–2020 (R9–R10)	2008 (W4), 2018 (W5)	1996 (W3), 2001 (W4), 2006 (W5), 2018 (W7)
Ukraine	Not involved	Not involved	Not involved	2004–2012 (R2–R6)	1999 (W3), 2008 (W4), 2020 (W5)	1996 (W3), 2006 (W5), 2011 (W6), 2020 (W7)

Source: self-edited based on Borbély et al.'s (2022) study.

Another major advantage of international surveys is that they are more detailed and in-depth than censuses. Depending on the theme, each survey covers the labour market and income characteristics, quality of life and living conditions, health status and value preferences of the population.

However, unlike censuses, international surveys do not involve the entire population but only a much smaller sample (usually a few thousand people), and we can infer certain characteristics of the population under study from these responses,

basically using data calculated further from a previous census. For this reason, interpreting international survey results as a description of the entire population should be treated with caution, as they cannot provide nearly as complete insights into the characteristics of the groups under study as censuses. Another disadvantage of the low sample size is that the data from international surveys are unsuitable for detailed spatially disaggregated analyses.

According to their official standards, only the latter three international surveys are supposed to record ethnic variables, whereas the central version of the three other surveys coordinated by Eurostat does not contain questions on ethnicity (Farkas 2017). In spite of this, during the actual data collection of the Eurostat surveys in individual countries, ethnic data are often collected as well (Table 2). This information surplus is therefore not available in the central databases of the surveys: the ethnically differentiated socio-economic data are only available for research purposes, if so, through the statistical offices of the countries.

However, if comparable data specifically on a minority population are also available, then with this specialized data and the central version of an international survey data, we can examine the socio-economic positions of the minority population concerning the total population. About the variables to be compared, it is important that the questionnaire design of the specific survey and the international survey match.

Table 2

**Applicability of large-scale international questionnaire surveys
in quantitative research on native ethnic Hungarian minorities**

Applicability	Large-scale international questionnaire survey					
	EHIS	EU-SILC	EU-LFS	ESS	EVS	WVS
Ethnic characteristics are asked in the central version of the survey questionnaire – ethnically differentiated socio-economic data are available in the central databases	No	No	No	Yes	Yes	Yes
Ethnic data are being collected during the actual data collection in individual countries – ethnically differentiated socio-economic data are available in the national databases	Yes	In Romania	Yes	Yes	Yes	Yes
The average sample sizes can represent Hungarian minority communities of regions/countries	No	No	Yes, in Romania and Slovakia	No	No	No

Source: self-edited based on Farkas' (2017) study and questionnaires of surveys conducted in individual countries.

Table 2 shows that most national databases have ethnicity and mother tongue variables. However, in most cases, the average sample sizes of these international

surveys do not usually guarantee that the data are statistically valid for the minority Hungarian population of a given region. Thus, these surveys are rarely suitable for a proper analysis of the socio-economic situation of minority Hungarians by themselves.

However, there are some exceptions: in Romania and Slovakia, the sample size of the EU-LFS survey is sufficiently large to make valid statements on minority Hungarian communities as well. Therefore, although it is not designed for that, this survey can directly reflect the features of ethnic Hungarians in these two countries. Nonetheless, EU-LFS data with ethnic variables have been used by only a few to examine the situation of Hungarians in Romania or Slovakia. One good example is the study of Csata (2017), who analysed not only census data but also EU-LFS data to examine the ethnic differences in the labour market of Romania.

Surveys specifically targeting minority Hungarians

In recent decades, several comprehensive data collection efforts have been conducted specifically to assess the socio-economic characteristics of minority Hungarian communities in multiple countries and regions. These surveys usually involved substantial involvement of researchers and institutions from the neighbouring countries of Hungary during their entire implementation, from planning to execution and analysis. However, these surveys were predominantly funded by various Hungarian institutions.

Among these institutions, Balázs Ferenc Institute was particularly active in the 1990s, conducting six comprehensive surveys commissioned by the Hungarian government between 1997 and 2001. These surveys primarily focused on various aspects of the value systems of minority Hungarians (Kiss–Kapitány 2009). During this period, the data collection efforts of the Teleki László Foundation's Central European Research Center also played a significant role (Márton 2022).

A prominent group involved in comparative studies on minority Hungarians aimed primarily at public policy purposes was youth research projects. The first of this kind was the Mozaik2001 survey coordinated by the National Youth Research Institute (Szabó et al. 2002). Another major youth research project was the GeneZYs2015 survey, organized through the collaboration of the Mathias Corvinus Collegium and the Institute for Minority Studies of the Centre for Social Sciences (Papp 2017).

In addition to these public policy-oriented surveys, a few academic studies were conducted in 2000. The most significant was Kárpát-projekt, which was performed jointly by the Department of Minority Studies at Eötvös Loránd University and the Márai Sándor Foundation in 1997. This project examined interethnic relations in the Carpathian Basin (Márton 2022).

Another key project was the Kárpát Panel survey conducted in 2007 by the Institute for Ethnic and National Minority Studies of the Hungarian Academy of

Sciences and the Max Weber Social Research Center in Cluj-Napoca. This survey aimed to establish a foundation for systematic, regular and longitudinal surveys on the socio-economic conditions of the five largest Hungarian communities. However, a comprehensive repetition of this panel survey did not occur, with only Transylvania seeing a follow-up in 2010.

Partly to fill this gap left by the Kárpát Panel, a survey called *Életminőség és jólét 2018* (in English: ‘Quality of life and well-being 2018’) has been implemented under the coordination of the Research Institute for National Strategy. The data collection occurred in 2018 and 2019 via stratified random sampling,³ targeting the four most populous minority Hungarian communities and the population of Hungary. In total, 4,200 persons declaring themselves Hungarian answered the questions.

The specific focus of surveys targeting minority Hungarians presents both advantages and disadvantages. As they are designed for that, in statistical terms, these surveys can represent the four most populous minority Hungarian communities, providing detailed and comprehensive information regarding them. However, these surveys rarely offer insights into other ethnic groups. Consequently, the position of different minority Hungarian communities can be compared with one another and the kin-state society. However, comparing the conditions of minority Hungarians to those of the titular ethnic groups is only feasible by including other data sources (censuses, international surveys). Regarding the indicator to be compared, the questionnaire design of the specific survey must match the other data sources.

Another drawback of these specific surveys is their sporadic and infrequent nature. In addition, similar to international surveys, these surveys are primarily suitable for examining the connections between the collected characteristics rather than comprehensively describing the entire population. Therefore, their descriptive results for each region’s Hungarian population should be treated carefully. Their sample sizes are also unsuitable for detailed territorial analysis.

Conclusions and discussions

The results of the literature review lead to the conclusion that only a few comprehensive studies have compared the socio-economic positions of the four most populous minority Hungarian communities – one of the largest autochthonous national minority communities in Europe. The shortage of data could be a reason for this. Former studies have rarely provided comprehensive pictures of the socio-economic situation of minority Hungarian communities, especially in comparison with the population of the kin-state, Hungary.

³As the possibilities for the usual guarantee of randomness are more limited in a minority sample (Kapitány 2010), a so-called improved or systematic quota sampling method was used in the case of less populous local Hungarian minority communities. The regional subsamples are representative of individuals by gender, age group, educational attainment and subregions in some case.

Table 3

**Main features of data sets suitable for examining
the socio-economic positions of Hungarian minorities**

Data set	Thematic scope	Ethnic or territorial differentiation	Advantages	Disadvantages
Census data	Basic data on the sociodemographic situation Ethnicity, mother tongue and religion Educational attainment Economic activity Housing conditions	Potential of ethnic differentiation Potential of territorial differentiation	Covering the entire population Regularity High reliability Published in details Available in all of the countries concerned	Rarely collected (every ten years) Limited data set Methodological differences between countries and between consecutive censuses within countries
International survey data	Depends on the thematic scope of the survey Basic data on the sociodemographic situation Economic activity Educational attainment Labour market status Income and wealth Health conditions Living conditions Quality of life Value preferences Political preferences Media consumption	Potential of ethnic differentiation No territorial differentiation (except entire historical regions inhabited by Hungarians)	Regularity Same methodology in the countries concerned Various thematic scope Detailed and deep data content	Usually not representative of Hungarian minorities Not available in all of the countries concerned
Surveys targeting Hungarian minorities	Basic data on the sociodemographic situation Educational attainment Labour market status Income and wealth Health conditions Language use Social relationships and trust Institutional trust Media consumption	No territorial differentiation (except entire historical regions inhabited by Hungarians) No ethnic differentiation other than the targeted minority community	Detailed data specifically on the Hungarian minorities Methodology and design adapted to censuses and international surveys Detailed and deep data content	Recorded occasionally, seldom Refer only to Hungarians; not suitable for comparison without other data sources

Source: self-edited based on Borbély et al.'s (2022) study.

The study further identified data sources that could be relied on when conducting quantitative and comparative studies on the socio-economic positions of the most populous minority Hungarian communities. Quantitative research on persons/communities with a certain ethnic background can be implemented using socio-economic data sets with ethnic variables. These types of datasets can be produced via (1) censuses, (2) large-sample international surveys and (3) other surveys designed specifically to measure the socio-economic characteristics of the minority Hungarian communities. The study evaluated the relevance, reliability, thematic scope, potential for ethnic and territorial differentiation and other advantages and disadvantages these data sources (Table 3).

Census data are reliable and comprehensive databases collected regularly. Ethnically differentiated census data make it possible to compare data among different countries and data on ethnic minorities to the titular one. However, census data of this type are not available in public databases, and their ethnic content is not always standardized. Ethnic data is also collected in most relevant international surveys; however, these surveys are rarely suitable for the comparative analysis of the socio-economic position of ethnic minorities because of their sample sizes. These shortcomings are intended to be mitigated by surveys targeting minority Hungarians. Although the positions of different minority Hungarian communities can be properly compared with one another and the kin-state society using data from these special surveys, they are unsuitable for comparison with that of the titular ethnic groups.

One solution can be the combined analysis of international survey data and survey data specifically targeting minority Hungarian communities. To utilize this opportunity in the case of ethnic Hungarian communities, we have to ensure that our targeted surveys on Hungarian minorities are designed with representativeness in all populous minority Hungarian communities and have synchronized questions and methodology with censuses and international surveys. Although it is not possible to perform a comprehensive combined analysis of currently available data, in-depth research would capture detailed territorial characteristics. The latter, however, would require completely new large-sample data collections, which would also take into account the characteristics of the spatial location of the Hungarian minority.

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