

One year of von der Leyen II: the risk of political overstretch

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ACKNOWLEDGEMENTS / DISCLAIMER

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Executive summary

Ursula von der Leyen began her second term as president of the European Commission on 1 December 2024 as one of the strongest presidents in the institution's history. She was re-elected by the European Parliament as a member of the EU's most powerful party, the European Popular Party (EPP), asserted her authority over the College of Commissioners and moved quickly on the EU's top priorities: defence and competitiveness. But a year on, her leadership style has increased the risk that the Commission fails to deliver on its objectives and promises.

The Commission president has appeared more interested in geopolitics and party politics than in designing future-oriented policies. She backtracked on previous priorities such as climate and digital, approached the competitiveness challenge largely through hastily designed legislative simplification, and overstepped her competences on defence and external relations, including on a potential peace deal in Ukraine. Meanwhile, she has failed to address key issues for the EU's future, such as enlargement, EU reform or how to fund the Union's needs in innovation and infrastructure.

In the meantime, von der Leyen also sought to manage relationships among the political groups that elected her in the European Parliament. She attempted to salvage the so-called 'von der Leyen coalition' by making wide-ranging promises, from tackling housing issues to pledging to end poverty and build a European electric car.

The von der Leyen II Commission risks political overstretch by being too active on too many issues and not hands-on enough where it can really make a difference. This increases the risk that the Commission will not deliver on promises it has made, widening an already visible rhetoric-action gap and leaving the EU insufficiently prepared for future challenges.

To improve the Commission's capacity to act in the face of mounting global challenges and the rise of anti-EU forces across the Union, Ursula von der Leyen should:

1. Open the governance of the Commission

Ursula von der Leyen should decentralise leadership in the Commission, give Commissioners greater political and administrative space, improve transparency in decision-making and accept robust media scrutiny.

2. Refocus on the Commission's competences

The Commission should make full use of the competences and expertise it already has, rather than seeking to expand them and risking failure. This applies in particular to defence, implementation of EU laws and policy domains where subsidiarity and broad buy-in are necessary to achieve political objectives.

3. Use leadership to prepare for the future

Ursula von der Leyen should use her political capital to initiate proposals for the Union's future and advocate them to member states. She should be more proactive in preparing for enlargement and internal reform, tabling bold proposals to address the EU's structural problems and develop options for an EU Enlargement Roadmap and Post-Accession Reform Plans. She should also explore all available options to meet the Union's funding needs and foster strategic investment.

4. Improve interinstitutional relations

The Commission president should work to facilitate constructive relations with the European Council and the European Parliament. She should reduce institutional competition with EU leaders on defence and geopolitics and help streamline deliberations with the European Council. In parallel, she should refrain from entering party politics in her working relations with the Parliament. For the remainder of her mandate, she should avoid using the State of the Union address to make scattershot announcements designed to placate political groups.

5. Clarify the division of responsibilities between the Commission and other institutions

Ursula von der Leyen should work with European Council President Antonio Costa to formalise cooperation between the Commission and the European Council through an interinstitutional agreement. The EU's growing 'geopolitisation' – in which community and intergovernmental issues increasingly intersect – and the Union's transformation into a security actor in the face of the Russian threat and US disengagement both necessitate a clearer division of roles.

Introduction

The title of the European Commission's 2026 Work Programme, published in October 2025, is *Europe's Independence Moment*,¹ it reflects both the grandstanding and the ambition that have defined the first year of the second von der Leyen Commission. The Brussels executive continues to stretch its prerogatives and broaden its scope of action – at the risk of not being able to deliver on its promises.

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Ursula von der Leyen became Commission president in 2019 and started her second term on 1 December 2024. Her endorsement by the European Council and re-election by the European Parliament (EP) as the lead candidate

of the European Popular Party (EPP) empowered her to further centralise her control over the institution, exert political leadership in the European Council and position herself as a coalition leader in the EP.

Von der Leyen has been active in geopolitics, involving herself in strategic discussions on Ukraine, and in party politics, calibrating her political agenda to placate parliamentary groups. Next to declaring an ill-defined “European independence” and taking positions on new defence projects, she has also promised to end poverty or build a European electric car.

At the same time, she appeared less invested in the policy areas where the Commission is expected to shape the Union's long-term direction: enlargement, EU reform and how to fund EU policies. Under her leadership, the Commission has also struggled to ensure effective implementation of EU legislation, including in areas such as digital regulation.

This raises the risk that the Commission will fail to deliver on its own stated objectives, widening the rhetoric-action gap that already prevents the EU from preparing adequately for future challenges.

The Commission: from a bureaucratic body to a political institution

The European Commission has been a driver of European integration since its creation in the 1950s. Conceived as a bureaucratic supranational body designed to transcend national interests,² it has over the decades evolved into a more political institution with expanding competencies across an ever-wider range of policy areas.

This evolution accelerated in recent years in response to successive episodes of the permacrisis,³ from the financial and debt crises to the migration crisis, the Covid-19 pandemic and Russia's full-scale invasion of Ukraine. The Commission expanded its role in agenda-setting and policy coordination, drawing on its legal and technical expertise, its exclusive right of legislative initiative and its management of new community instruments created to address the crises, most notably the post-pandemic €750 billion NextGenerationEU (NGEU).

In parallel, the Commission underwent internal reforms that asserted the political authority of Commissioners over the administration and increased the vertical power of the president and their cabinet.⁴

The ‘presidentialisation’ of the Commission's leadership was reinforced by the Lisbon Treaty provision that the European Parliament elects the Commission president, and by the introduction of the *Spitzenkandidat* system, under which the lead candidate of the European party winning the European elections should become president.

Commission presidents are also members of the European Council, which allows them to benefit from the institution's centrality to raise their profile and advance their agenda.⁵ As the oldest institutional office in the EU system, the Commission occupies a pivotal position in the EU institutional architecture. This enabled Jean-Claude Juncker, upon taking office in 2014, to declare that he would lead a “political Commission”. He sought, with limited success, to strengthen the Commission's role as agenda-setter and policy entrepreneur.⁶ Juncker's successor, von der Leyen, though arriving with limited politico-institutional experience at the EU level, has followed the same path in asserting the Commission's political role.

Von der Leyen, alone at the top

During her first term (2019–2024), von der Leyen faced two major crises: the Covid-19 pandemic and Russia's full-scale invasion of Ukraine. Under her leadership, and following decisions taken by the European Council, the Commission deployed its budgetary, regulatory and coordinating powers to support the public response to the pandemic. It funded research and led the joint procurement of 4.6 billion vaccine doses.⁷ It also took action to ease cross-border movements and facilitated support for industries and households by suspending state-aid rules and certain banking requirements.⁸ It elaborated and managed large-scale crisis response mechanisms, including the €100 billion Support to mitigate Unemployment Risks in an Emergency (SURE) instrument to support national job retention and the NextGenerationEU plan.

In the wake of Russia's full-scale invasion of Ukraine, the Commission coordinated 19 packages of EU sanctions against Moscow, as well as financial and humanitarian support for Ukraine. It further organised joint purchasing of gas and ammunition and elaborated the Act in Support of Ammunition Production (ASAP) to ramp up industrial output.

Von der Leyen asserted her leadership through her role in the EU's crisis response, leading the Commission's work and regularly using social media to promote her actions and declarations.⁹ By the end of her first term, in 2024, 75% of respondents in an EU-wide survey could identify her as Commission president, a much higher rate than for her predecessor (40%).¹⁰ She ran for re-election as the European People's Party (EPP) lead candidate following the European Council's proposal, and was re-elected by the European Parliament in July 2024. As a second-term president, with the EPP the dominant political family in both the European Council and Parliament, von der Leyen began the 2024–2029 cycle as one of the strongest presidents in the Commission's history.

From the outset of her second term, she tightened her control over the institution. Dissenting Commissioners from her first mandate, such as Thierry Breton, Josep

Borrell and Paolo Gentiloni, were not reappointed.¹¹ In the new College, the distribution of portfolios created overlaps that diluted responsibilities and allowed von der Leyen to arbitrate between Commissioners, further centralising decision-making.¹²

Commissioners are not always informed about issues that directly affect their portfolios – as happened, for example, during the preparation of the next Multiannual Financial Framework (MFF).

Even more than during her first term, leadership and decision-making within the Commission are now concentrated around the president and Chief of Cabinet Björn Seibert.¹³ As a result, Commissioners are not always informed about issues that directly affect their portfolios – as happened, for example, during the preparation of the next Multiannual Financial Framework (MFF).¹⁴ This prompted criticism of von der Leyen's governance, including from the EU Ombudsman.¹⁵ It also raised questions about the transparency and accountability,¹⁶ particularly given the tight control exerted by the president's cabinet over communication and von der Leyen's own reluctance to engage directly with journalists, which suggest a deliberate avoidance of scrutiny.¹⁷

In this context, the Commission's political agenda and capacity to fulfil its functions depend more than ever on von der Leyen's prioritisation of policy areas. They also depend on the bandwidth of her cabinet to manage the political agenda and internal processes, with a risk of bottlenecks in the Commission's policymaking.

Backtracking and moving priorities

When she took office in 2019, von der Leyen's priority was the fight against climate change, and the Green Deal became her flagship initiative. This choice reflected public pressure, seen in opinion surveys and climate marches across Europe, as well as the political need to secure support from the left and the Greens, the latter of which had gained 22 seats in the European Parliament elections.¹⁸

In her second term, von der Leyen had shifted her priorities towards defence and competitiveness, in line with the EU Strategic Agenda adopted by the European Council after the 2024 EU elections,¹⁹ and with the agenda of her own political family, the EPP.²⁰ At the same time, amid a growing 'green backlash' from parts of public opinion and some business sectors,²¹

von der Leyen has de-prioritised the Green Deal.²² Climate policies have been subordinated to economic and competitiveness considerations. As a result, the Commission has begun rolling back²³ several measures from the previous term, particularly through a series of so-called simplification omnibuses.²⁴

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More broadly, von der Leyen's prioritisation of defence and competitiveness has overshadowed all other policy issues. An analysis of the Commission's legislative proposals and agenda-setting communications during its

first months in office shows that climate and environment – as well as other commitments set out in the Political Guidelines, such as social issues and democracy – were hardly addressed at all.²⁵

In the EU's political and institutional system, the Commission has long derived credibility from its ability to design and implement long-term policies.²⁶ Yet in a context of rapidly evolving crises, and due to leadership choices, the institution is increasingly being pulled into short-termism, weakening its capacity to offer strategic direction and leaving it more vulnerable to political fluctuations.

The Commission, as guardian of the Treaties, is also responsible for implementing and enforcing EU law. It has traditionally driven the 'Brussels effect': the EU's ability to set global standards thanks to the strength of its Single Market. However, in 2025, under pressure from the second Trump administration and from US tech giants,²⁷ the Commission appeared reluctant to fully implement the Digital Services Act (DSA) and the Digital Markets Act (DMA), two flagship laws from the previous mandate regulating online platforms.²⁸ As part of a 'digital omnibus' of simplification presented in November, it also proposed suspending parts of the 2024 AI Act and modifying the General Data Protection Regulation.²⁹

Von der Leyen's selective overreach

Against the backdrop of the EU's growing geopoliticisation,³⁰ where internal and external policies increasingly interact to safeguard the Union's economic security and global role, Ursula von der Leyen has identified diplomacy and defence as issues on which to assert political leadership – effectively pushing climate policy down her agenda.

The Commission's exclusive competence over trade policy has become a key instrument and a high-stakes issue in the Union's external relations. Von der Leyen has invested heavily in this domain, especially in the EU's relationships with the US, Mercosur and India, which she visited with the entire College of Commissioners. She has also adopted a more assertive posture towards China.³¹ Yet while the Commission president does not, under the Treaties, lead the EU's diplomacy – a role reserved for the High Representative and President of the European Council in coordination with member states – von der Leyen has de facto attempted to assume this role on many occasions.

Since Russia's full-scale invasion of Ukraine, the Commission has been instrumental in supporting the European defence industry and expanding Europe's military capacities. But von der Leyen has also ventured into defence policy and strategic issues – core state

powers – clearly overstepping her formal competences. She has spoken about deterrence and Europe's security architecture³² and participated in meetings about security guarantees for Ukraine.³³

While the Commission president does not lead the EU's diplomacy, von der Leyen has tried to assume this role on many occasions.

However, she faced pushback from member states after floating the possibility of a multinational military deployment in Ukraine,³⁴ proposing new defence initiatives without consultation,³⁵ and attempting to coordinate member state capacity-building. In October 2025, the European Council explicitly reminded the Commission that member states remain in charge of EU defence policy,³⁶ signalling an inter-institutional competition over leadership in this area.

While overreaching on her preferred issues, von der Leyen has been more cautious about other important topics, such as the EU's future organisation and funding, that fall squarely within the Commission's competences but are less visible to the wider public and politically less rewarding.

Enlargement to the Western Balkans and the Eastern Trio has been hailed as a "geostrategic investment".³⁷ Yet the latest Enlargement package, issued in November 2025, stuck to procedural assessments and lacked political ambition.³⁸ The Commission has not provided options to respond to candidate countries' expectations or to materialise the EU's promises. Moreover, the long-awaited pre-enlargement policy reviews – intended to detail the internal reforms needed to prepare the Union for 30+ members – remain unpublished, nine months after their expected release.

The Commission's leadership is also absent on the question of how the Union plans to finance its political priorities. Following the Draghi report on competitiveness and demands from member states,³⁹ the Commission published a Competitiveness Compass,⁴⁰ launched a series of legislative simplification omnibuses to support EU industry and initiated work to deepen the single market.

However, the Commission has not addressed the core financial challenge identified in the report: the massive investment needed for the green and digital transitions as well as the defence surge. Annual financing needs for industry and infrastructures are now estimated at €1,200 billion until 2031.⁴¹ Although the Commission proposed a €234 billion European Competitiveness Fund as part of the 2028–2034 MFF, the final amount will depend on the outcome of negotiations with the Council and Parliament – and will remain far below what is required.

The Commission's political overstretch

Setting the political agenda is a core function of the Commission president and a key source of institutional leadership.⁴² The proliferation of crises that are more effectively managed at EU level, combined with the broader politicisation of the Union, has increased expectations for the Commission to respond.⁴³

In parallel, the election of the Commission president by the European Parliament, together with the *Spitzenkandidat* system, has encouraged both MEPs and von der Leyen to treat the Commission as if it were an EU government accountable to a parliamentary majority.⁴⁴ As a result, the president must respond to political group demands – first to secure election and thereafter to maintain support.

This dynamic has broadened the Commission's scope of action and linked it more closely to party politics. Several portfolios in the current College such as Defence, Preparedness, Housing and Intergenerational Fairness, reflect this evolution.

In a fragmented Parliament, where the groups that backed von der Leyen's re-election do not form a stable supporting coalition,⁴⁵ she has spent significant time and political capital trying to keep them aligned. In 2024 already, she convened the leaders of the EPP, Social Democrats and liberal groups in her office to help resolve internal disputes.⁴⁶

Since the start of her second term, she has shown willingness to address an increasingly wide range of issues, at the risk of overstretching the institution's

technical capacity and diluting political coherence. In her first State of the Union speech,⁴⁷ in September 2025, she announced an extensive list of upcoming initiatives: a 'drone wall' to deter Russia, a small and affordable European electric car, measures for accessible housing, a programme to support independent journalism and media literacy, work to reduce children's access to harmful social media and even an ambition to "help eradicate poverty by 2050".⁴⁸

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Taken separately, each of these issues is legitimate and resonates with the priorities of different political families. Taken together, they reflect a habit of top-down EU policymaking within a complex multilevel governance system, and the belief that the Commission can provide policy or legislative solutions to every challenge.

An increased risk of failure

The Commission faces the challenge of delivering on the issues it has chosen to prioritise – including defence capacities, competitiveness and housing – which cannot be addressed through its usual regulatory or budgetary tools alone.

To meet these objectives, the Commission needs, at minimum, the support of member states (as demonstrated by the October 2025 European Council on defence) as well as the capacity of European social and industrial actors to implement what has been decided, as demonstrated by the Green Deal. When the Commission presents itself, through its institutional communication, as *the* EU institution, it exposes itself to blame if objectives are not achieved.⁴⁹

In its first year in office, the von der Leyen II Commission presented seven omnibus packages to simplify legislation in areas including sustainability, investment, agriculture, the defence industry, chemicals and digital. It claimed that these measures would save between €57 billion and €66 billion.⁵⁰ But, contrary to its internal procedures, it did not conduct impact assessments when elaborating packages that substantially modify existing legislation. The EU's Ombudsman judged this as a case of maladministration.⁵¹

Omnibus packages generate legal uncertainty for industry, and because they were hastily prepared and not subject to impact assessment, they may also generate unintended effects and lead to economic difficulties.

Simplification is a request from the European Council since October 2024 and may benefit the EU's competitiveness by reducing costly administrative

burdens on companies.⁵² However, omnibus packages generate legal uncertainty for industry,⁵³ and because they were hastily prepared and not subject to impact assessment, they may also generate unintended effects and lead to economic difficulties.

Rushing legislation, as well as moving beyond the Commission's traditional policy domains, create human-resources constraints: bottlenecks, gaps in expertise and personnel and budgetary shortages. The Commission estimates that EU legislation passed since the start of the 2021–2027 budget has created additional staffing needs of more than 1,660 full-time posts.⁵⁴ This strains its administrative capacities.⁵⁵

Overall, selective overreach and political overstretch increase the risk that the Commission will not be able to deliver on the objectives and promises it has made, including the ones it has prioritised. The von der Leyen II Commission risks widening an already existing rhetoric–action gap, “in which soaring speeches and declarations are not followed up with difficult decisions and sustained implementation”.⁵⁶ Doing so would leave the EU unprepared for the future.

The presidentialisation of the Commission is also detrimental to von der Leyen herself, and by extension to public trust in the EU. One example is von der Leyen's handling of negotiations with the Trump administration over tariffs on EU imports to the US.

During spring and summer 2025, she led the discussions in accordance with the Commission's competences on trade and on the basis of a mandate from member states.⁵⁷ But she overacted her role, and after meeting with Donald Trump to finalise an agreement limiting tariffs on EU imports to 15% (and posing with him with her thumb raised), she was held accountable for what was widely considered a poor outcome. 75% of respondents in a poll conducted in the five largest EU countries thought she had ‘badly defended’ EU interests. Some 61% blamed her for the outcome, compared with 28% who pointed to member states and 7% to their own national government.⁵⁸

Five steps to improve the Commission's capacity to act

The von der Leyen II Commission still has four years in office. The remaining time of this mandate will likely bring new challenges and demands on the Commission to manage the EU's response. The political and institutional pitfalls visible in the first 12 months of this politico-institutional cycle can still be remedied according to the following steps:

1. Open up the Commission's governance

Ursula von der Leyen should de-centralise leadership of the Commission and give more political and administrative space to the Commissioners – practicing the “spirit of collegiality” that she preached in her mission letters.⁵⁹ She should, in particular, respect the

treaty prerogatives of the EU's High Representative, who is also Commission vice-president.

This would prevent the Commission's agenda from depending too heavily on the president's own issue prioritisation and capacity to engage with other leaders. It would also streamline internal processes by reducing bottlenecks at the president's cabinet level. The Commission would better fulfil its political role if all Commissioners fully took ownership of its agenda.

Ursula von der Leyen should de-centralise leadership of the Commission and give more political and administrative space to the Commissioners.

Von der Leyen should also improve transparency, including within the institution, by adopting a more open and less tightly controlled communication approach and by accepting media scrutiny. This would increase democratic accountability and contribute to public trust.

2. Refocus on the Commission's competences

The Commission should refocus on existing competences and expertise, making full use of them instead of trying to expand its portfolio and risking failure.

On defence, it should concentrate on supporting R&D and industrial cooperation in the already identified capability areas, rather than trying to define the member states' collective defence strategy. A priority should be to contribute, together with member states, to the implementation of the Readiness Roadmap 2030.

The Commission should also fully use its regulatory powers to implement the Digital Services Act (DSA) and Digital Markets Act (DMA) more forcefully, as well as trade-defence instruments like the Anti-Coercion Instrument. Achieving this would do more to strengthen the EU's global actorness and protect its interests than rhetoric alone.⁶⁰

To address the challenge of achieving what has been promised, especially in economic and social domains such as industry, the climate transition or housing, the Commission should avoid trying to fix everything at EU level through legislation. Instead, it should favour subsidiarity and secure buy-in from all actors – local authorities, industry and civil society – to minimise risk of failure (on new issues like housing and poverty) or backtracking (as happened with the Green Deal).

3. Use leadership to prepare for the future

In addition to making better use of the Commission's competences, its president should make wiser use of her political leadership. Ursula von der Leyen should refrain from acting as a head of state or government. The role of a Commission president is not to define Europe's defence policy, lead the EU's diplomacy or manage a dysfunctional European Parliament. Instead, she should steer the Commission towards long-term thinking. She should use her political capital to initiate proposals for the Union's future and advocate for them to member states.

In particular, von der Leyen should be more proactive in preparing the EU's enlargement and internal reform processes, which should be addressed in tandem if they are to stand the test of time.⁶¹ The Commission should prioritise the publication of the overdue pre-enlargement policy reviews to enable a concrete discussion on the policy and governance reforms required for a Union of 30+ members.

It should put bold proposals on the table to address the EU's structural problems and improve governance and decision-making. This would confront member states with concrete options and trigger the necessary debate on how to ensure that the EU doesn't continue to rely on improvised crisis-management.

The role of a Commission president is not to define Europe's defence policy, lead the EU's diplomacy or manage a dysfunctional European Parliament. Instead, she should steer the Commission towards long-term thinking.

Regarding enlargement, the Commission should go beyond technical management and develop options for an EU Enlargement Roadmap and Post-Accession Reform Plans.⁶²

Von der Leyen should also address the question of funding the EU's priorities. Her proposal for the next MFF was a good starting point but remains far below what is needed to confront all current challenges and potential crises ahead.⁶³ The Commission should explore options to meet the Union's funding needs and foster strategic investment,⁶⁴ and von der Leyen should lead the political discussion with member states.

The fact that member states are divided on major issues like enlargement, EU reform and funding should not be a reason for von der Leyen to avoid these debates. Rather, it is a reason to be ambitious and engage national leaders – with the aim of moving the EU from rhetoric to action.⁶⁵

4. Improve interinstitutional relations

The Commission president should use her political leadership to foster relations with the other two main EU institutions: the European Council and the European Parliament. This would facilitate decision-making and prevent political instability at the EU level.

Solutions to crises and breakthrough in European integration happen only when there is a strong relationship within the EU's dual executive formed by the European Council and the Commission.⁶⁶ By focusing on the Commission's competences, von der Leyen would help reduce institutional competition and streamline deliberations with the European Council. Member states, for their part, should also accept that the Commission's role in defence policy can be useful and important.

In parallel, von der Leyen should refrain from entering increasingly conflictual party politics in her working relationship with the European Parliament. European political parties and the EP should also have an honest discussion on how the Spitzenkandidat system and ensuing partisan politics impact the relations between Parliament and the Commission, and reform it ahead of the next EU elections.⁶⁷

For the rest of her mandate, von der Leyen should use the State of the Union speeches to outline how

the Commission intends to concretely deliver on EU priorities, rather than making scattershot announcements designed to keep political groups happy.

5. Clarify the division of responsibilities between the Commission and other institutions

To increase institutional trust and ensure efficient implementation of EU priorities, the Commission and European Council should lay down their respective and complementary roles in setting and delivering long-term strategies.⁶⁸ The two institutions should formalise their cooperation through an interinstitutional agreement signed by von der Leyen and her European Council counterpart, António Costa.

This is particularly warranted in the context of the EU's growing geopoliticisation, where traditional community issues, such as trade and competition, are increasingly linked to the Union's external relations.

The same applies Europe's defence. As the EU transforms into a security provider in the face of Russia's threat and US disengagement, there is a need to define the Commission's role and specify how responsibilities are distributed between EU institutions and bodies, such as the European Defence Agency.

Conclusion

The European Commission is at the heart of all EU policymaking and is essential to the Union's capacity to tackle the challenges of the permacrisis. But a year into her second mandate, Ursula von der Leyen risks undermining the institution's ability to fulfil its role where it could be most useful: preparing the EU's future and ensuring that EU laws and priorities are fully implemented.

In the face of growing global challenges and the rise of anti-EU forces across the Union, the Commission needs a change of leadership style and political agenda. This is a time when clarity and unity are needed from EU leaders. The alternative is to fail – and further erode citizens' trust.

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