



Brussels Info Flash

18 September 2026

H/Advisors' Analysis

Von der Leyen sets out a sovereignty agenda for a more independent Europe

The 2026 State of the Union frames Europe's next phase around competitiveness, security and resilience, with new initiatives on industry, energy, defence and digital regulation. Commission President **Ursula von der Leyen** used her **2026 State of the Union** address to present European sovereignty as the central priority for the coming year. Against a backdrop of war in Ukraine, Russian hybrid threats, high energy costs and global competition for industrial capacity, she argued that Europe must strengthen its ability to act independently while preserving its social model, democratic values and openness to global partnerships. The economic core of the speech focused on **competitiveness**, simplification and investment.

Von der Leyen called for faster permitting, a pact against national **gold-plating**, further progress on the **Single Market**, and stronger mobilisation of private savings through the **Savings and Investments Union**. Energy was also presented as a decisive factor for Europe's industrial future, with electrification, grid investment and homegrown clean energy seen as key to lowering costs and reducing dependencies.

Security formed the second major pillar of the address. Von der Leyen announced plans for a new **European security strategy**, an **Emergency Security Protocol** to respond to hybrid threats, and further support for Ukraine, including stronger air defence and tighter enforcement of sanctions against Russia. Overall, the speech points to a more assertive Commission agenda, built around competitiveness, industrial resilience and Europe's capacity to defend its interests in a more hostile international environment.

Highlights of the week

- **Defence and Ukraine support.** The Commission disbursed €3.3 billion in defence funding to Ukraine, while Parliament backed measures to accelerate EU defence investment, procurement and security responsiveness.
- **Health and pharma resilience.** Parliament adopted recommendations on the EU's cardiovascular health strategy and debated health workforce sustainability, while the Commission highlighted progress under EU Missions including cancer-related objectives.
- **Banking and financial markets.** The week included the Commission's €11 billion EU-Bond issuance, Parliament votes on ESMA and EBA appointments, and discussions on the euro's global role and the 2027 EU budget.
- **Energy and environment.** Key files included ETS and CBAM votes, new initiatives on water resilience and waste shipments, renewable energy funding, small modular reactors and sustainable aviation fuel.

Main Issues in the EU

The Council

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- **EU long-term budget and competitiveness.** European Council President António Costa met Ireland's Taoiseach Micheál Martin in Dublin, stressing Ireland's role in the Council Presidency and calling for agreement on the 2028-2034 EU budget by the end of 2026, with a focus on new own resources, defence, competitiveness, cohesion, agriculture and affordable housing.

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- **EU long-term budget and competitiveness.** European Council President António Costa met Austrian Chancellor Christian Stocker in Vienna, calling for agreement on the 2028-2034 EU budget by the end of 2026 and linking it to competitiveness, capital markets, affordable energy, migration, enlargement and support for Ukraine.

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- **European Arctic Summit.** European Council President António Costa attended the European Arctic Summit in Rovaniemi, stressing the Arctic's strategic importance for EU security, climate policy, critical raw materials and the EU's future long-term budget.

The Commission

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- **Ukraine defence funding.** The Commission disbursed €3.3 billion to Ukraine under the €90 billion Ukraine Support Loan to support defence procurement, including drones and missiles.
- **Waste shipments.** The Commission launched a public consultation on the draft list of non-OECD countries authorised to receive non-hazardous EU waste after May 2027, and published an assessment of EU plastic waste exports to Türkiye.
- **Water resilience.** The Commission announced the launch of the European Water Resilience Stakeholder Platform and the European Water Academy to support implementation of the EU Water Resilience Strategy.
- **Merger control.** The Commission cleared Vinci Energies' acquisition of All for One Group and the merger between Publigas and Publi-T under the simplified merger review procedure.

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- **EU KIDS Act.** The Commission adopted the EU KIDS Act to strengthen children's online safety and restrict social media platforms' access to children in the EU.

- **Storm recovery support.** The Commission proposed to mobilise €489 million from the EU Solidarity Fund to help Portugal, Spain, Italy and Malta recover from severe storms and flooding.
- **Renewable energy projects.** The Commission allocated nearly €126 million under the Connecting Europe Facility to support three cross-border renewable energy projects in Germany, Poland, Latvia and Lithuania.
- **EU-Korea space cooperation.** The Commission and South Korea agreed to deepen cooperation on secure satellite connectivity and explore future links with the EU's IRIS² constellation.
- **Sustainable aviation fuel.** EASA published its annual ReFuelEU Aviation report, showing that sustainable aviation fuel supply in the EU exceeded the 2025 mandatory target.
- **Supply chain resilience.** The Commission and the EIB published a joint report on how EU firms are adapting supply chains to geopolitical risks and fragmented global trade.
- **Democratic resilience.** The Commission announced the launch of a European Citizens' Panel on Democratic Resilience, bringing together 150 citizens to develop recommendations for future EU action.
- **Merger control.** The Commission cleared the acquisition of Health & Medical Service by Helsana and SBB under the simplified merger review procedure.

16 September 2026

- **State of the Union.** President von der Leyen delivered her 2026 State of the Union address, setting out the Commission's priorities on competitiveness, defence, Ukraine, democracy, energy and social policy.
- **EU-Bonds.** The Commission raised €11 billion in its 8th syndicated transaction of 2026, as part of its €80 billion funding target for the second half of the year.
- **Artificial intelligence.** The Commission welcomed the design of the first IPCEI in AI, jointly prepared by 19 Member States to support decentralised and commonly accessible AI services.
- **Geographical indications.** The Commission approved the registration of *Olio dei Colli di Bologna*, an Italian extra virgin olive oil, as a Protected Geographical Indication.
- **Merger control.** The Commission cleared acquisitions involving Baureka, Senior and AeroFlow under the simplified merger review procedure.

- **Nickel merger investigation.** The Commission sent MMG a Statement of Objections over its proposed acquisition of Anglo American's nickel business, citing concerns in the market for low-carbon ferronickel.

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- **Energy regulation.** The Commission launched the Energy Regulation Academy to support national authorities and public officials in implementing EU electricity market and energy reforms.
- **Small modular reactors.** The Commission backed a €40 million EIB investment in Finnish company Steady Energy to support the development of small modular reactor technology for carbon-free heating.
- **Copernicus.** The EU launched the Copernicus Sentinel-3C satellite to support Earth observation, climate monitoring, ocean data and disaster response.
- **Green hydrogen and critical raw materials.** Team Europe committed over €57 million to support green hydrogen, minerals and metals value chains in South Africa under Global Gateway.
- **Merger control.** The Commission cleared Iberdrola's acquisition of Finnish electricity distribution company Caruna under the simplified merger review procedure.
- **Fair labour mobility.** The Commission proposed a Fair Labour Mobility package to strengthen social rights for mobile workers across the EU, including measures on social security coordination, the European Labour Authority and skills portability.

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- **EU Missions.** The Commission published a mid-term assessment of the five EU Missions under Horizon Europe, highlighting progress on climate adaptation, cancer, soil and water-related objectives.
- **Romanian State aid.** The Commission approved a €52 million Romanian scheme to support cattle farmers facing higher fuel and fertiliser prices.
- **Merger control.** The Commission cleared Allianz's acquisition of Ingenico and EFMS's acquisition of Exolaunch under the simplified merger review procedure.

The European Parliament

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- **EU-Canada relations.** Canadian Prime Minister Mark Carney addressed Parliament on EU-Canada relations, with a focus on shared security, economic interests and geopolitical tensions.

- **Social media and young people.** MEPs voted on recommendations to address the impact of social media on young people, including addictive design and online safety.
- **Common Fisheries Policy.** MEPs voted on recommendations to update the CFP, aiming to protect the marine environment and support fishers' income.
- **Ceuta and external borders.** MEPs voted on a resolution following the plenary debate on Ceuta and EU external border protection.
- **Narco-trafficking.** MEPs voted on proposals to strengthen the fight against drug trafficking in European waters.
- **Health workforce crisis.** MEPs debated and voted on proposals addressing healthcare workforce sustainability, working conditions and the resilience of health systems.
- **Global health resilience.** MEPs debated and voted on an oral question on strengthening global health resilience in partner countries.

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- **State of the European Union.** MEPs debated the 2026 State of the Union with Commission President Ursula von der Leyen.
- **Defence readiness.** Parliament held final votes on legislation to accelerate defence investment and improve EU security responsiveness.
- **Hybrid warfare.** MEPs voted on proposals to strengthen EU protection against hybrid threats, including attacks on critical infrastructure, cyberattacks and disinformation.
- **EU aid for Ukraine.** MEPs debated the need to increase EU support for Ukraine, including ahead of another winter of Russian attacks on critical and civilian infrastructure.
- **EU Customs Code.** MEPs approved the reform of the EU Customs Code, introducing stricter rules for e-commerce and establishing a new EU Customs Authority.
- **Cardiovascular health.** MEPs adopted recommendations on the EU's first strategy on cardiovascular diseases.
- **EU budget 2027.** The Council presented its position on the draft 2027 EU budget to MEPs.
- **Court of Auditors.** MEPs voted on whether to endorse Gerald Loacker as Austria's member of the European Court of Auditors.

- **Single Market and Customs Programme.** MEPs voted on the programme for the 2028-2034 period.
- **Gender inequalities in health.** MEPs voted on a report addressing gender inequalities in health, including gender-specific conditions.
- **Nuclear safety cooperation.** MEPs voted on the Instrument for Nuclear Safety Cooperation for 2028-2034.
- **Gold-plating and SMEs.** MEPs debated the implementation of EU legislation by Member States and concerns over additional administrative burdens for SMEs.
- **PPWR and SMEs.** MEPs debated the impact of the Packaging and Packaging Waste Regulation on SMEs, administrative burden and the Single Market.
- **Floods in Nepal.** MEPs held a debate with the Council and Commission on the devastating floods in Nepal.
- **Ignalina nuclear decommissioning.** MEPs voted on the nuclear decommissioning assistance programme for the Ignalina nuclear power plant in Lithuania.
- **Human rights and democracy.** MEPs held urgent debates on media freedom in Hong Kong, political prisoners in Cuba and post-electoral repression in Zambia.

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- **European Democracy Shield.** MEPs debated and voted on recommendations to strengthen the EU's resilience against foreign interference, hybrid attacks and disinformation.
- **ETS and carbon leakage.** MEPs voted on proposals covering the CBAM extension, the Temporary Decarbonisation Fund and reforms to the ETS market stability reserve.
- **Defence readiness.** MEPs debated the Defence Readiness Omnibus, aimed at accelerating defence investment, procurement and permitting.
- **Hybrid warfare.** MEPs debated recent hybrid attacks against EU Member States with High Representative Kaja Kallas.
- **Ceuta and external borders.** MEPs debated the situation in Ceuta and the need for a coordinated EU response to protect external borders.
- **Heatwaves, wildfires and droughts.** MEPs debated EU preparedness and response following the extreme climate events of summer 2026.

- **Middle East escalation.** MEPs debated the latest escalation in the Middle East with High Representative Kaja Kallas.
- **Serbia and war crimes.** MEPs debated the glorification of war crimes in Serbia following the funeral held for Ratko Mladić.
- **EU Youth Strategy.** MEPs voted on recommendations to better integrate young people's priorities into EU policies.
- **Global role of the euro.** MEPs voted on a report on strengthening the euro's international role.
- **Armenia trade liberalisation.** MEPs voted on temporary trade-liberalisation measures applicable to Armenian products.
- **ESMA and EBA appointments.** MEPs voted on the appointment of the ESMA Chair and the Executive Director of the European Banking Authority.
- **Fair Labour Mobility Package.** MEPs held a scrutiny session on the Commission's Fair Labour Mobility Package.

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- **Public Procurement Act.** MEPs held a plenary debate with the Commission on the Public Procurement Act.
- **ETS and carbon leakage.** MEPs debated the CBAM extension, the Temporary Decarbonisation Fund and changes to the ETS market stability reserve ahead of Tuesday's votes.
- **EU Customs Code.** MEPs debated the reform of the EU Customs Code, including stricter rules for e-commerce, greater platform responsibility and the creation of a new EU Customs Authority.

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