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*Single Voice,
Fragmented Audience,
Weak Reception*

November, 2025



VDL 2.1 | EUROPEAN COMMISSION

Rebuilding a Narrative for the EU in Times of Uncertainty

In an increasingly volatile geopolitical landscape, the European Commission faces the challenge of sustaining a coherent narrative that resonates with a citizenry diverse in interests and perceptions.

This report sheds light on **how the Commission communicates, its capacity to build a unified institutional narrative, adapt to fragmented audiences and maintain message consistency** within an increasingly dynamic information ecosystem, and **how this communication intersects with media and social conversations across the EU**.



Drawing on artificial intelligence and big-data techniques applied to institutional, media and social sources, we answer the question

What are Europeans talking about?

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And we explore it from three complementary angles:

- **Institutional communication:** *what is the Commission saying to the European society at such a critical juncture and how is it saying it?*
- **Media coverage:** *do the media in the Member States contribute to consolidating, amplifying, or fragmenting the social conversation around the EU's strategic priorities?*
- **Social conversation:** *what are the main concerns that emerge in citizens' discussions about the EU across the Member States?*

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Methodology and Sources

The analysis is structured around the **seven priorities set out by the European Commission for the 2024-2029 period**: Competitiveness, quality of life, security and defence, social model, Europe in the world, democracy and values, and budget and reforms

851 speeches delivered by the **27** members of the College of Commissioners.

@EU_Commission X account identifying thematic priorities (1,598 posts).

2,543,741 mentions of Europe's priorities in digital media outlets across the **27 Member States**.

18,259,971 public mentions on the social network X (Twitter) linked to each priority across the 27 Member States.



Processing and labelling of speeches

Assigning probability scores to each text and determine which strategic priority it corresponded

Query design and linguistic treatment

Data collection through priority-specific boolean queries constructed for each EU official language based on the official keywords.

Validation and quality control

Manual validation phase to verify semantic relevance and correct thematic assignment.

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Take-away messages

01/ A COHESIVE INSTITUTIONAL NARRATIVE.

The Commission has built a strong and coherent institutional narrative

- Competitiveness is positioned as a cross-cutting priority for the new mandate.
- Under Ursula von der Leyen's leadership, the Commission projects a unified and recognisable voice.
- Effective coordination across Commissioners and a steady multi-channel communication presence.

02/ A FRAGMENTED PUBLIC CONVERSATION

Europe's communication ecosystem remains highly dispersed

- Social media amplify national differences and multiply divergent voices.
- Traditional media offer a more structured debate but still reflect territorial and cultural biases.
- Public attention gravitates toward concrete, short-term issues, often at the expense of long-term priorities.

03/ DIVERSE FRAMES, PERCEPTIONS AND THEMES.

Each layer of the conversation — institutional, media and citizens — focuses on different topics

- This diversity reflects Europe's diversity but adds complexity to the narrative landscape.
- Citizens look at the EU through different lenses:
 - some seek protection from external threats;
 - others demand safeguards against internal ones.

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INSIGHT #1





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A Cohesive Institutional Narrative

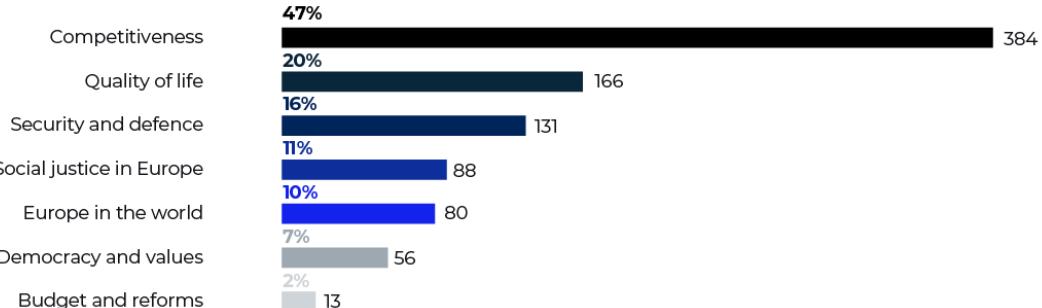
The analysis of the Commission's communication reveals a **notable capacity to build a cohesive and consistent narrative around competitiveness** as the central organising idea.

The **cross-cutting nature of the competitiveness message**, present across a significant proportion of Commissioners and adapted with relative consistency across channels, strengthens the perception of a Commission that speaks with **one voice** amid a global landscape marked by growing volatility.

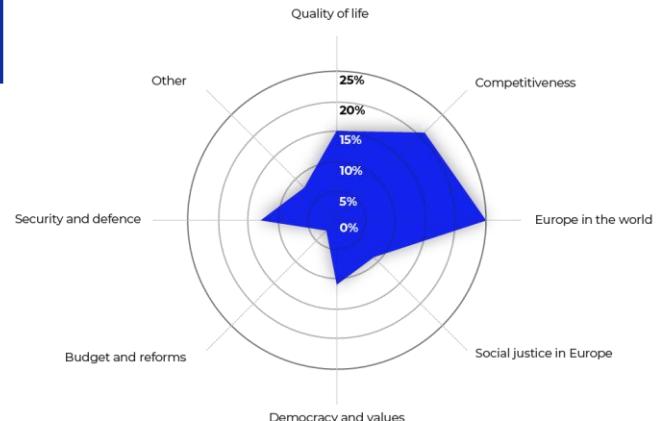
Competitiveness at the centre of the communication

In line with its commitment to placing competitiveness at the centre of its agenda, the Commission has directed the majority of its public communication towards this priority.

DISTRIBUTION OF SPEECHES BY PRIORITY (COMMISSIONERS)



Nearly half of Commissioners' speeches (**47%**) focus on competitiveness, while in the social conversation this theme represents **21%** of all messages, consolidating it as the communicative pillar of the current political cycle.



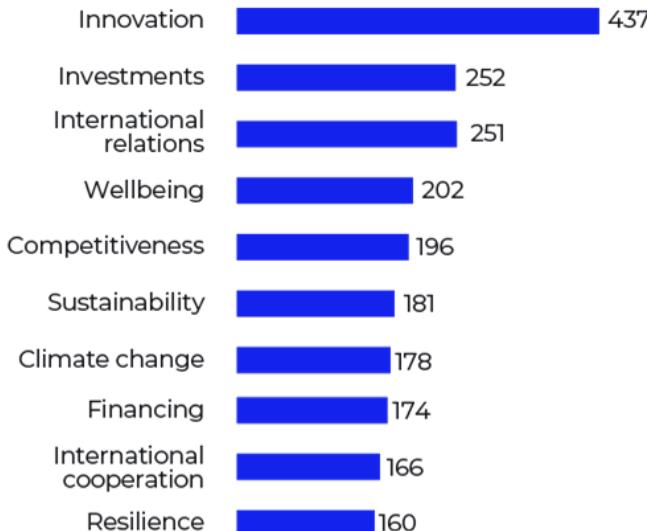
DISTRIBUTION OF MESSAGES BY PRIORITY (EUROPEAN COMMISSION - X)

Innovation as the Commission buzzword



The analysis of the most frequent terms in the speeches reinforces this pattern. **Concepts such as innovation and investment dominate the institutional discourse**, projecting the ambition to position the European Union as a competitive and resilient global actor,

TOP 30 MOST FREQUENT SEMANTIC FIELDS (COMMISSIONERS)

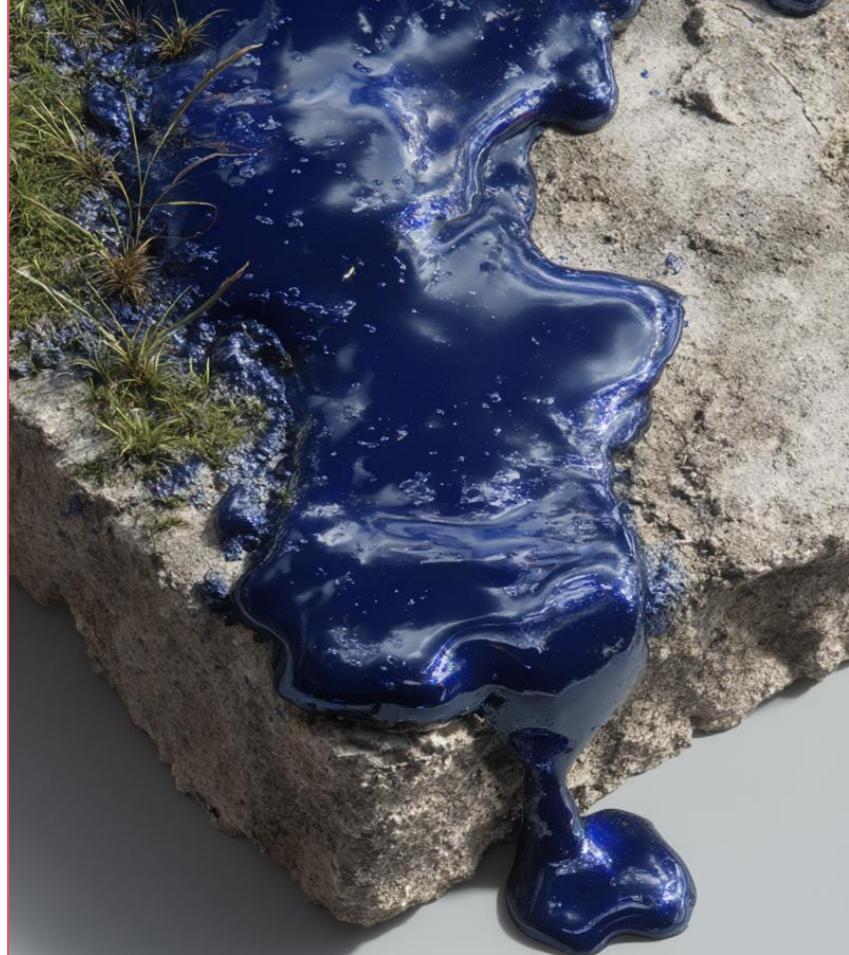


Competitiveness as a cross-cutting message

With competitiveness as her overriding priority, President Ursula von der Leyen has set much of the College's communication direction. Notable interventions include the presentation of the Competitiveness Compass last January and her remarks at the Copenhagen Competitiveness Summit in October.

Unlike priorities more clearly associated with a single Commissioner, **communication on competitiveness is shared across multiple individuals.**

Commissioners such as Valdis Dombrovskis (Economy and Productivity), Maroš Šefčovič (Trade and Economic Security), and von der Leyen herself participate actively in this conversation, consolidating a common message that cuts across departments.



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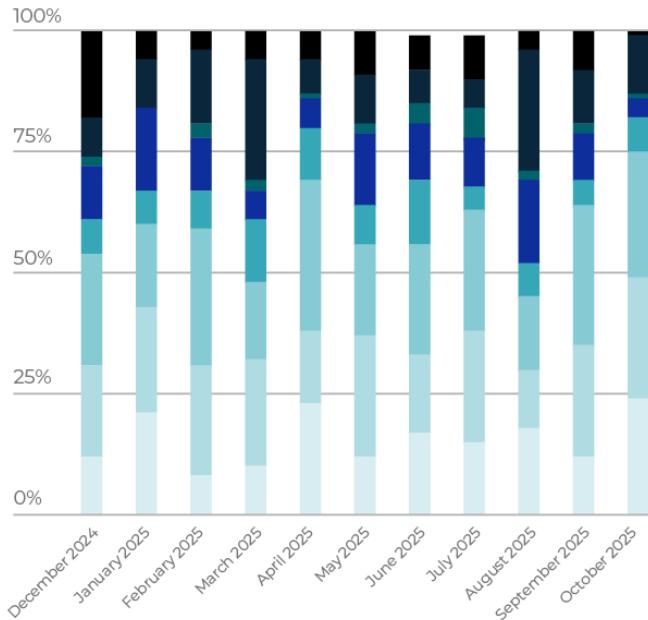
A stable communication strategy

The Commission has maintained a stable communication approach throughout the first year of the **mandate**, with a relatively balanced distribution across its priorities and a clear preference for messages centred on competitiveness and the EU's global role.

Together, these two priorities have consistently accounted for more than 40% of total communication activity, underscoring the stability of the institutional narrative. At the same time, tactical peaks linked to specific initiatives can be observed, enabling the Commission to reinforce particular messages at moments of heightened political or institutional relevance.

- None
- Security and defence
- Budget and reforms
- Democracy and values
- Social justice in Europe
- Europe in the world
- Competitiveness
- Quality of life

MONTHLY FREQUENCY AND PROMINENCE BY PRIORITY
(EUROPEAN COMMISSION – X)



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INSIGHT #2





VDL 2.1 | INSIGHT #1

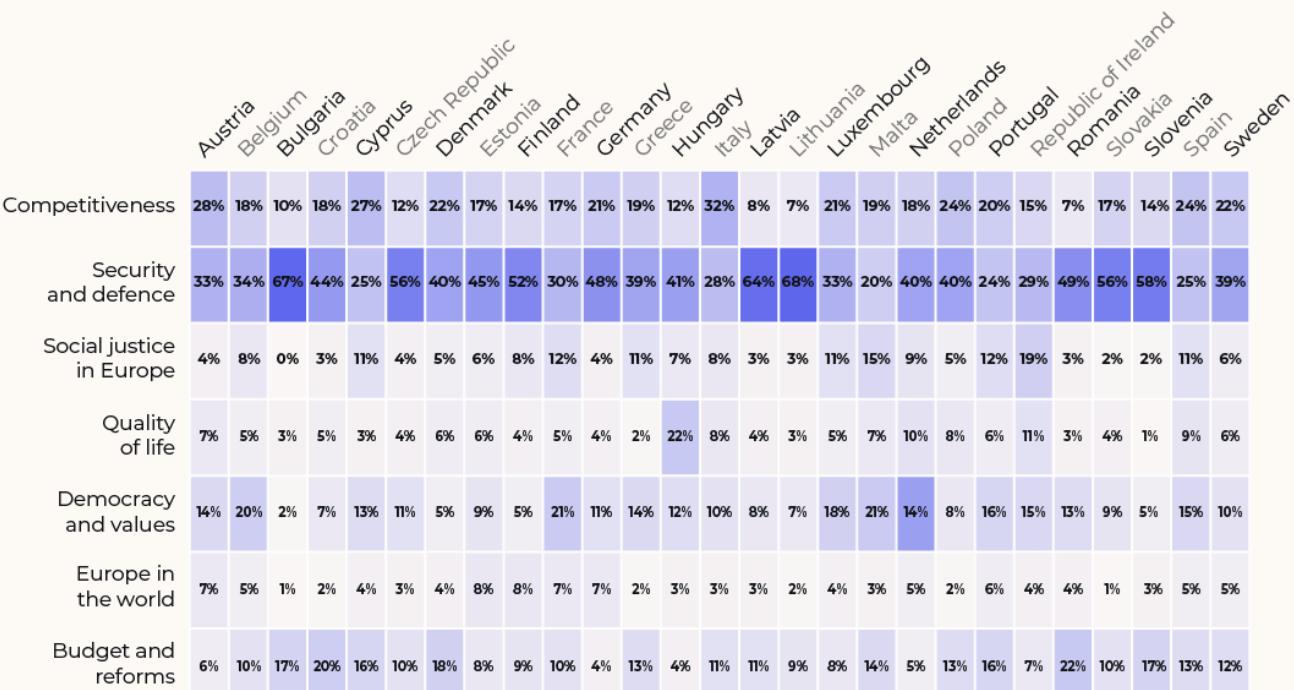
A Fragmented Public Conversation

The evidence analysed suggests that **Europe's public conversation around the EU's strategic priorities displays a high degree of fragmentation, shaped by diverse national, cultural, and media realities.**

In the digital environment, this fragmentation becomes even more pronounced.

Media as discourse curators

By contrast, the media landscape across Member States offers a relatively more structured conversation. Unlike the more open and dispersed citizen debate, **media discourse tends to concentrate on a narrower set of issues when covering European matters**.



ONLINE NEWS COVERAGE — PRIORITY RELEVANCE BY MEMBER STATE

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To Each, Their Own

The fragmentation of the European conversation is especially visible in the differing themes that predominate at each level of discussion — citizen, media and institutional.

This diversity poses significant challenges for the Commission's institutional communication, which must operate in an environment where public attention is dispersed, audiences are segmented, and communication channels continue to multiply.

VDL 2.1 | INSIGHT #3

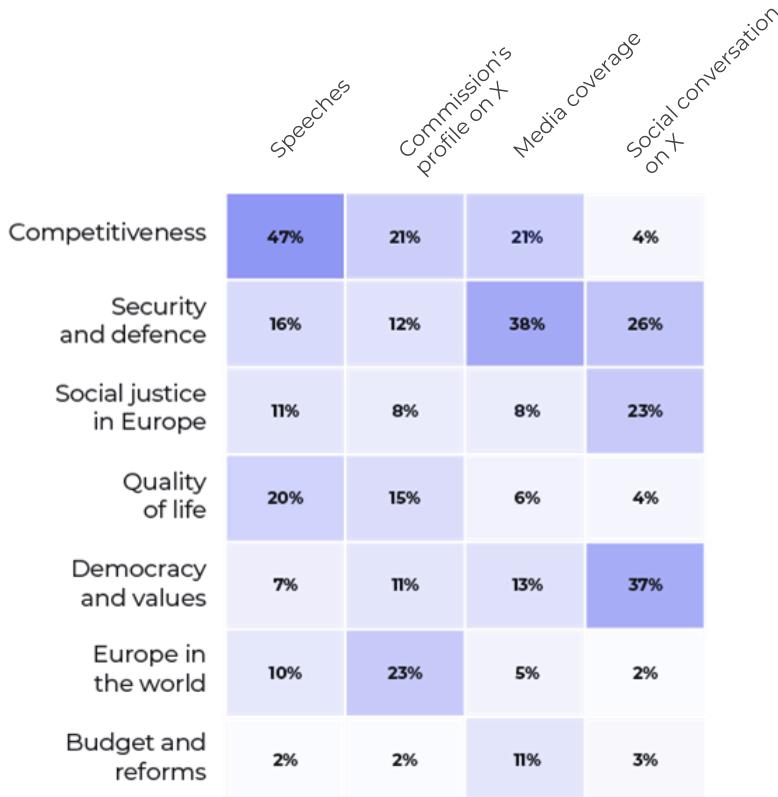
Institutional Messaging vs. Public Concerns

In line with its political programme, the Commission has placed competitiveness at the heart of its communication strategy. The repeated presence of this theme in the messaging of multiple Commissioners strengthens both the consistency of the narrative and its visibility.

Opposite to that, the social conversation, as reflected on platforms such as X, reveals however how people mostly focus on external threats and security concerns, or on internal challenges and the protection of democratic values.

Although slightly more cohesive around certain themes, the digital media ecosystem still reflects this diversity.

Uncertainty about the Union's future is shared, but the viewpoints differ.



COMPARATIVE ANALYSIS

VDL 2.1 | INSIGHT #3

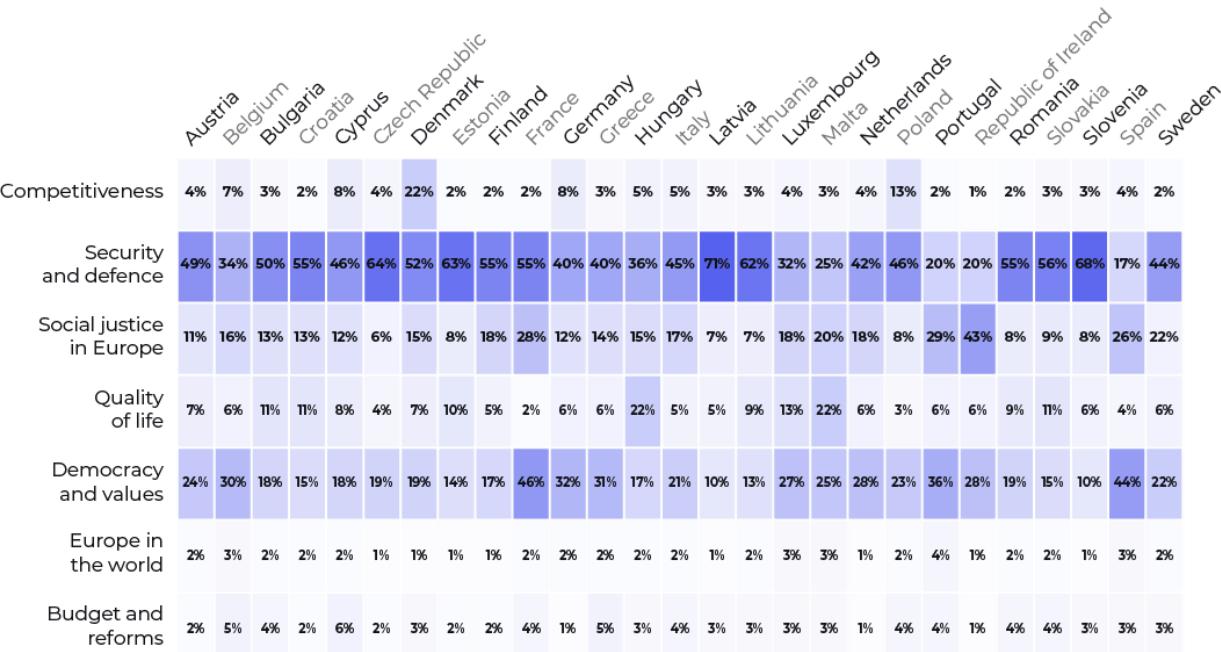
Citizens' conversation

When looking at the conversation among European citizens, as captured through X, **security and defence account for a substantial share of total mentions (26%)**.

This interest is especially strong in certain Member States, where the geopolitical context heavily shapes the public agenda (Latvia, Slovakia, Estonia, Czech Republic)

In contrast, **in other Member States the conversation more frequently revolves around issues relating to democracy and values.**

This theme is predominant in countries such as France (46%) and Spain (44%).



SOCIAL CONVERSATION ON X (TWITTER) — PRIORITY RELEVANCE BY MEMBER STATE

Media coverage

The digital media ecosystem still reflects this diversity, again pointing to different regional perceptions.

Media outlets give security issues a central place, accounting for around 38% of total coverage. This focus is particularly strong in certain Member States (with countries such as Lithuania, Latvia, Croatia, Slovakia, and the Czech Republic). In Italy (28%), Spain (25%) and Portugal (24%), by contrast, security receives considerably less attention.

Competitiveness emerges as a major theme (21%). Media coverage here often highlights innovation, digitalisation, and productivity as the engines of Europe's global standing in a shifting geopolitical landscape.



ONLINE NEWS COVERAGE — PRIORITY RELEVANCE BY MEMBER STATE

Values as the Way Forward

The current debate on the Union's strategic priorities reflects both the potential and the limits of Europe's public sphere: diverse, plural, and dynamic, yet still some distance from becoming a truly shared conversation about the European project and its future.

Against this backdrop, the **Commission's central communication challenge is to promote an inclusive narrative, one capable of bringing citizens together** around the continued relevance of the European project in a period of volatility and change.

Focusing institutional communication on values not only reinforces Europe's identity but also provides a practical framework for mobilising collective action in key strategic areas.

The task is not simply to communicate more, or even better, but to communicate with purpose: to move beyond the silos and headlines of political programmes and public policies, and to widen the shared narrative around the values that provide inspiration and legitimacy, crucially, to enable joint action among the Union's partners.

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The background of the advertisement features a dynamic, abstract design composed of swirling, translucent blue and white shapes. These shapes create a sense of motion and depth, resembling liquid or energy particles. The overall aesthetic is modern and energetic.

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