

15-19 April 2024

I. Political and Policy Developments

1. Letta report sets out new roadmap for EU single market
2. ESPAS report outlines key imperatives for incoming EU leadership
3. Top jobs developments: Pieper resigns; Costa gets closer to European Council presidency; Ribera tipped as next Spanish Commissioner
4. ECR delays manifesto
5. Věra Jourová appointed as Justice Commissioner
6. Conservatives win Croatia's general elections

II. Latest Projections

III. Key institutional milestones

I. Political and Policy Developments

1. Letta report sets out new roadmap for EU single market

Enrico Letta, former Prime Minister of Italy and President of the Jacques Delors Institute, presented his [report on the future of the single market](#) to the European Council on 18 April.

The report calls for an “empowerment” of the single market, with energy, telecommunications, the financial sector and defence as its key pillars. The former Italian PM proposes a “fifth freedom” dedicated to the free movement of research, knowledge and education, stressing the need to stimulate innovation in strategic areas such as health and AI.

Letta argues that while the imperative to meet the EU's green targets “cannot be overstated,” farmers or automotive workers cannot disproportionately bear the costs of the green transition. He calls for the creation of an EU-wide state aid fund to finance the bloc's green transition.

Speaking at a [press conference](#) on 17 April, European Council President Charles Michel stated Letta's report provided “guidelines for the months and years ahead,” referring to the ongoing work on the [Strategic Agenda 2024-2029](#) - a document that outlines the political priorities of national governments ahead of the next EU legislative cycle. Meanwhile, Stefan Löfven, the President of the Party of European Socialists (PES), [welcomed](#) the report as “a wake-up call to complete the single market.”

2. ESPAS report outlines key imperatives for incoming EU leadership

On 15 April, the European Strategy and Policy Analysis System (ESPAS) published its [fourth Global Trends Report](#). ESPAS is an EU inter-institutional network developing strategic foresights to help policymakers make informed decisions.

The 2024 Global Trends Report highlights that Europe has entered into an era of “polycrises” shaped by geopolitical, economic and environmental upheavals. The report anticipates significant changes between 2024 and 2040 and foresees that the EU will increasingly be called upon to strengthen its resilience and strategic autonomy. The report highlights the green transition as a major focus for the years ahead, referring to the dichotomy between the environmental imperatives and the socio-economic costs.

ESPAS provides a number of recommendations for the next EU leadership, including transforming the EU into a “smart power” capable of strengthening competitiveness in strategic sectors, developing an ‘interest-driven’ trade policy, and designing a coherent European defence policy. ESPAS also calls for a “social contract fit for the 21st century,” capable of upholding social cohesion and addressing the demographic crisis.

Reflecting on these conclusions at an [event](#), Commission Executive Vice President Maroš Šefčovič called on the EU to adapt to the changing geopolitical environment and conduct a “reality check.” Meanwhile, European Parliament Vice President Marc Angel (S&D, Luxembourg) stated that future EU policies needed to be grounded in long-term considerations rather than short-term political interests.

3. Top jobs developments: Pieper resigns; Costa gets closer to European Council presidency; Ribera tipped as next Spanish Commissioner

In a new twist for Commission President Ursula von der Leyen’s bid for a second term, German centre-right MEP Markus Pieper [renounced](#) his post as SME Envoy, just hours before he was due to start. In his tweet, Pieper accuses French Commissioner Thierry Breton (associated with Renew Europe) of having “boycotted” his appointment to score political points. Pieper’s announcement puts an end to an awkward saga for von der Leyen’s campaign, which saw four commissioners and a majority of MEPs mobilising against her decision to appoint Pieper.

The Lisbon Court of Appeal lifted judicial control measures against the suspects of an alleged corruption case involving former Portuguese PM Antonio Costa. This development boosts Costa’s chances of landing an EU top job - his name is circulating as one of the main candidates for the European Council presidency.

Spain’s Vice PM and Minister of Ecological Transition Teresa Ribera is tipped to be the next Spanish Commissioner. Ribera is expected to head the Spanish Socialist Party list for the EU election, making her likely to be Sánchez’s first pick for a commissioner post. With Ribera’s profile, Spain could secure a Commission vice-presidency and a Green Deal related portfolio.

4. ECR delays manifesto

The right-wing European Conservatives and Reformists (ECR) group has delayed the adoption of its election manifesto to 23 April, during the last plenary session of this European Parliament. The manifesto was previously expected on 17 April. The ECR is also expected to appoint a lead candidate.

The content of the manifesto will be watched closely across political circles, given increasing speculation that the ECR might have a key role in post-election negotiations and be a key player determining political balances in the next mandate.

5. Věra Jourová appointed as Justice Commissioner

Commission Vice President Věra Jourová, in charge of values and transparency, has taken over the EU Commission's justice portfolio, a position until then occupied by Belgium's Didier Reynders.

Reynders took a leave of absence from the Commission to campaign to become the next Secretary-General of the Council of Europe. Jourova already oversaw Reynders' portfolio as Vice President. Jourová and Reynders are also both associated with Renew Europe.

Jourová stated that she would not seek another term as Commissioner.

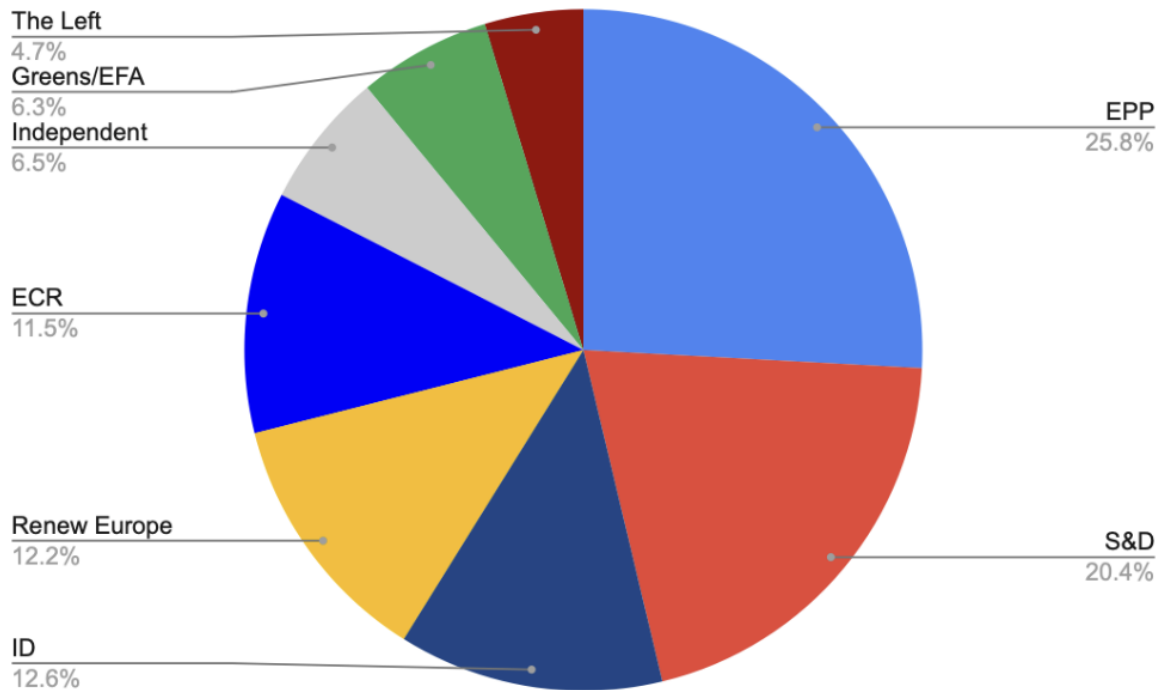
6. Conservatives win Croatia's general elections

The Croatian Democratic Union (HDZ), the party of incumbent Prime Minister Andrej Plenković, won the most seats in the country's general elections on 17 April.

HDZ secured 61 seats, while the centre-left coalition led by the Social Democrats (SDP) won 42. Plenković's party is likely to form a coalition with the nationalist Homeland Movement (DP), which came third with 14 seats. Coalition talks are expected to start next week.

A HDZ-DP government would add Croatia among the list of Member States where parties associated with European People's Party form a coalition with far-right parties.

II. Latest Projections



1. **European People’s Party (EPP):** 176 seats
2. **Progressive Alliance of Socialists and Democrats (S&D):** 139 seats
3. **Identity and Democracy (ID):** 86 seats
4. **Renew Europe:** 83 seats
5. **European Conservatives and Reformists (ECR):** 78 seats
6. **Independent:** 44 seats
7. **Greens – European Free Alliance (Greens/EFA):** 43 seats
8. **The Left (GUE/NGL):** 32 seats

Source: [Politico](https://www.politico.com) (18/4/2024).

III. Key institutional milestones

Date	Event
22-25 April	European Parliament last plenary session
23 April	ECR election manifesto
6-9 June	EU elections
17 June	European Council on 2024-2029 strategic agenda / top jobs appointments
27-28 June	European Council on top jobs appointments
1 July	Beginning of Hungarian Presidency
July	Formation of new European Parliament
16-19 July	European Parliament first plenary session
September	Formation of new European Parliament committees



September	European Commissioner-candidates hearings
October/November	New Commission takes office