

Young Generation Policy Brief

Balancing Enlargement and Cohesion

Partial Integration of Ukraine's Agriculture into the EU

By Léo Christophe, Domenico Morelli, Noé Collomb

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Balancing Enlargement and Cohesion: Partial Integration of Ukraine's Agriculture into the EU

BY NOÉ COLLOMB, LÉO CHRISTOPHE, DOMENICO MORELLI

Executive Summary

Ukraine's integration into the EU agricultural market raises a critical tension between solidarity with Kyiv and the need to uphold cohesion and equality between Ukrainian and European farmers. While vital for economic and geopolitical reasons, unregulated liberalisation risks distorting EU markets and fuelling political backlash. This brief sets out three proposals: (1) dynamic safeguard mechanisms and a subsidy fund to cushion competition distortions, (2) a reformed CAP with a seven-year transition, capped direct payments, and green compliance funds, and (3) a 'Made in EU' label to protect farmers and guide consumers.

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INTRODUCTION

The label “breadbasket of the USSR” has gradually shifted to “breadbasket of Europe”: both expressions are used to describe Ukraine, a heavyweight in global agriculture. The sector accounts for 10.9% of Ukraine’s GDP, provides around 14% of all jobs, and represents 41% of the country’s total exports.¹ It is therefore one of the pillars of the Ukrainian economy. This prominence has made Ukraine’s agricultural sector a strategic concern not only for its own economy but also for the European Union (EU).

However, since the start of Russia’s war of aggression against Ukraine on February 24, 2022, agricultural production has plummeted. Key crops exported to the EU suffered a sharp decline in production: wheat production fell by 30%, sunflower seed production by 25% and corn production by 36% between the 2021-2022 and the 2024-2025 harvests. This has led to rising food prices, both for Ukrainians and for European consumers.

Russia’s blockade of Ukrainian ports in the Black Sea further deepened the crisis, and fears of a worldwide food shortage increased global food prices. In response, the EU launched the EU-Ukraine Solidarity Lanes on May 12, 2022. This initiative aimed to facilitate the export of Ukrainian goods via EU road, rail, and river networks, pursuing a triple objective: ensuring global food security, helping to curb price inflation, and supporting the Ukrainian economy.

Supporting agriculture, so vital to Ukraine’s economic stability, has become a way for the EU to indirectly contribute to both the country’s humanitarian and military efforts. By 2024, nearly 60% of Ukraine’s total exports were destined for the EU.² Before and since 2022, the EU has implemented a range of measures to boost Ukrainian agricultural exports. While

intended to offset the devastating effects of war on Ukrainian exports, they have unintentionally generated market distortions in several EU Member States, generating tensions. These tensions reveal a deeper conflict: how can the EU support Ukraine’s agricultural exports as a geopolitical priority while also safeguarding the livelihoods of its farmers, especially in further integrating Ukraine into the European agricultural market?

DESCRIPTION OF THE CONTEXT AND IMPORTANCE OF THE PROBLEM

Despite recent developments, the bilateral EU-Ukraine trade is regulated by the 2014 Association Agreement, including a Deep and Comprehensive Free Trade Area (DCFTA, 2016), which maintains quotas and tariffs on certain agricultural products. In 2022, together with the Solidarity Lanes, the EU agreed on the Autonomous Trade Measures (ATM) Regulation, liberalising all Ukrainian exports to the single market for one year. It was renewed in 2023, extending trade liberalisation until June 5, 2024.

The EU significantly increased its imports from Ukraine from 2022 to 2023: corn imports rose by 84%, wheat imports skyrocketed by 1,600%, and barley imports jumped by 736%. From 2024 to 2025, the EU’s share of Ukrainian imports remained high: corn 57.1%, wheat 49.5%, barley 39.1%.³ By August 2025, the Solidarity Lanes had allowed Ukraine to export 189 million tons of goods, including around 87 million tons of grain, oilseeds, and related products.⁴

The Solidarity Lanes and ATMs, affecting almost 20% of Ukraine’s exports to the EU, helped immediately reduce global food prices.⁵ However, the nearly 70% increase in agri-food

¹ Albaladejo Román, Antonio. 2024. “Extension of EU trade benefits to Ukraine.” European Parliamentary Research Service, April 16. [https://www.europarl.europa.eu/thinktank/en/document/EPRS_A TA\(2024\)760439](https://www.europarl.europa.eu/thinktank/en/document/EPRS_A TA(2024)760439).

² Fortuna, Gerardo. 2025. “Un reset commercial entre l’UE et l’Ukraine : que se passera-t-il après l’expiration de l’accès en franchise de droits ?” Euronews, June 4. <https://fr.euronews.com/my-europe/2025/06/04/un-reset-commercial-entre-lue-et-lukraine-que-se-passera-t-il-apres-lexpiration-de-laccès->.

³ Avd, Lalita. 2025. “EU’s duty-free measures drove growth in Ukraine’s grain exports. What happens after they expire?” S&P

Global, May 14. <https://www.spglobal.com/commodity-insights/en/news-research/latest-news/agriculture/051425-eus-duty-free-measures-drove-growth-in-ukraines-grain-exports-what-happens-after-they-expire>.

⁴ European Commission. 2025. “EU-Ukraine Solidarity Lanes.” https://commission.europa.eu/topics/eu-solidarity-ukraine/eu-assistance-ukraine/eu-ukraine-solidarity-lanes_en. Accessed September 1, 2025.

⁵ Brzeziński, Bartosz. 2025. “EU to reinstate quotas on Ukraine as emergency trade deal lapses.” Politico, April 8. <https://www.politico.eu/article/eu-to-reinstate-quotas-on-ukraine-as-emergency-trade-deal-lapses/>.

exports to the EU also disrupted markets in neighbouring Member States.⁶ Farmers were doubly affected by higher input costs, energy costs, and falling incomes due to the grain glut caused by Ukrainian imports. This situation led to protests in several Member States bordering Ukraine, which unilaterally restricted Ukrainian agricultural imports and domestic sales in April 2023.

To address these worries, the Commission disbursed €156 million to affected farmers and agreed to the temporary restriction of domestic sales in these countries⁷, while allowing the transit of Ukrainian products. When the Commission let the temporary measures expire in September 2023, considering that the market distortion had disappeared, Poland, Hungary, and Slovakia reinstated the domestic sales bans. In January 2024, the Commission proposed to renew the ATMs for a further year, introducing a 'reinforced safeguard mechanism' to limit the imports of the 'most sensitive products' (at that time: poultry, eggs, and sugar), implementing an emergency brake activated if the import volume exceeds the 2021 to 2023 average.⁸ The final agreement with the Member States extended the ATMs until June 5, 2025. It also added oats, groats, maize, and honey to the 'sensitive products' list, which finally contained seven products.

On Monday, June 30, 2025, a revised version of the Deep and Comprehensive Free Trade Area (DCFTA) was agreed upon. Ukraine has pledged to gradually align its agricultural production standards with EU norms by 2028. The European Commission assures that to safeguard EU markets, "efficient safeguard mechanisms"⁹ will be introduced, particularly in situations where imports risk causing disruption. For sensitive agricultural products such as eggs, sugar, and wheat, "import

quotas will be increased but kept below historical trade volumes to help preserve market stability". This means that import quotas will increase, but they remain more limited than the full liberalisation previously offered under the ATMs.

Nonetheless, European farmers remain sceptical. Faced with both the Ukraine and upcoming Mercosur trade agreements, they are demanding regulatory parity, more transparent product labelling, and robust fallback mechanisms to prevent market destabilization.¹⁰ As Ukraine's integration into the EU market deepens, the Union is increasingly pressured to define a sustainable and politically viable strategy that reconciles geopolitical solidarity with the protection of its agricultural base.

CRITERIA

Explicit and legitimate criteria are essential for effectively evaluating policy options aimed at strengthening cohesion within an enlargement process, such as in the Ukrainian case. The cohesion objective¹¹ is particularly critical in this context. It aims to reduce structural disparities between regions and Member States, especially in rural areas, in order to promote harmonious development, therefore ensuring equality and solidarity. Ukraine's GDP per capita illustrates the magnitude of the gap it has been deeply contracted during the war and right now is approximately €6.260¹² while the Average GDP in the European Union is about €39.680¹³, so around 15% of the EU average; therefore it will be the poorest potential member state of the European Union.

A complete integration of Ukraine without considering any transitional mechanism would result in a disproportionate redirection of EU funds (especially agricultural ones) toward

⁶ Albaladejo Román. 2024.

⁷ European Commission. 2024. "EU exceptional market measures enhance the agricultural sector's resilience amidst crises." January 23. https://agriculture.ec.europa.eu/media/news/eu-exceptional-market-measures-enhance-agricultural-sectors-resilience-amidst-crises-2024-01-23_en.

⁸ Albaladejo Román. 2024.

⁹ European Commission. 2025. "EU and Ukraine reach agreement in principle on a modernised trade relationship." June 30. https://ec.europa.eu/commission/presscorner/detail/en/ip_25_1672.

¹⁰ De La Hamaide, Landauro. 2025. "Farmers in EU raise alarm over Mercosur, Ukraine trade deals." Reuters, June 4.

<https://www.reuters.com/sustainability/climate-energy/farmers-eu-raise-alarm-over-mercotur-ukraine-trade-deals-2025-06-04/>.

¹¹ Articles 174 to 178, Treaty on the Functioning of the European Union

¹² International Monetary Fund. 2025. "GDP per capita, current prices."

<https://www.imf.org/external/datamapper/NGDPDPC@WEO/UKR?zoom=UKR&highlight=UKR>.

¹³ Eurostat. 2025. "National accounts and GDP". As of June 2025. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=National_accounts_and_GDP.

Ukraine in order to reduce the differences with other states, but without ever implementing a real integration project within the European single market. Cohesion is even about keeping the social and economic fabric of the EU intact. If Member States perceive that their agricultural sectors are sacrificed for geopolitical interests, enlargement will lose its legitimacy. The objective of cohesion would be threatened if the integration creates regional economic breakdowns, sudden fiscal burdens, and perceived inequalities in access to EU funds; all of which have already happened during the previous trade deal between Ukraine and the EU regarding the ATMs.

Cohesion must be operationalised through measurable indicators like the analysis of expected fiscal redistribution via the Common Agricultural Policy (CAP) and cohesion funds, alongside regional GDP convergence trajectories to EU average indicators. It is crucial to consider the resilience of local markets in more fragile and affected states like Poland, Romania, and Slovakia that have witnessed protests and unilateral trade restrictions, highlighting the potential for the cohesion value to be undermined when ignored.

Cohesion can be considered protected if the integration model avoids financial shocks in the European single market, preserves a more balanced funding allocation between the Member States, while ensuring a gradual convergence of Ukraine's agricultural economy with the EU norms without profoundly influencing rural economies in other Member States, therefore respecting the objectives written in Article 174 TFEU.¹⁴

The consequences of a flawed policy could even undermine other values enshrined in the Article 2 of the Treaty of the European Union (TEU)¹⁵ like equality (of the rules for farmers and of the rights between European and Ukrainian farmers), fairness (between Ukrainian and European farmers) and solidarity (with Ukraine and the affected European farmers) that may erode if Members of the Union perceive Ukraine as a burden, especially during ongoing war recovery and its redistributive demands when the conflict with Russia will eventually end. This situation could illustrate a clash of values between the policy of solidarity in supporting Ukraine and the societal realities needing equality, cohesion and fairness.

The sustainability, feasibility, and societal acceptability of any proposed reforms must be considered. The EU must ensure that these reforms endure beyond the severe war context and

the pressure from farmers. Policies should be designed to be politically and legally feasible, as well as quickly implementable given the urgency of the situation. Furthermore, it needs to be acceptable to the different actors: Member States, farmers, and Ukraine. To do so, it needs to fulfil the expectations of these groups by efficiently and transparently solving the challenges. It therefore requires negotiation and dialogue with farmers' unions, while continuing to bring sufficient and important support to Ukraine.

This will maximise the chances of successfully implementing a long-lasting and efficient reform to ensure cohesion within the agricultural sector of the Member States, while preserving the EU's solidarity with Ukraine, another core value of the European Union.

POLICY OPTIONS

In light of the aforementioned values of cohesion, equity, and solidarity, evaluated through the indicators of balanced funding allocation, convergence with norms, sustainability, feasibility, and societal acceptability, various policy options are now examined below. Each proposal addresses a specific dimension of agricultural integration and offers different tools to balance support for Ukraine while minimizing the adverse effects on the European single market.

Policy Option 1: Addressing potential distortion of the competition created by an integration of Ukraine in the European single market

The progressive opening of the EU market to Ukrainian agricultural products has brought both opportunities and challenges. While it supports Ukraine's economy and strengthens political solidarity, it has also generated market tensions in several Member States, particularly where farmers have felt exposed to sudden competition with Ukrainian products. To reconcile these competing objectives, it is important to integrate mechanisms that could mitigate distortions and ensure a fairer, more balanced path towards integration.

A policy option is the application of a modular model (like in the Western Balkans) that can integrate gradually stronger sectors (industrial and digital) and can delay the full

¹⁴ Articles 174-78 TFEU

¹⁵ Article 2, Treaty of the European Union

integration of more sensitive sectors like the agricultural one. Another solution is to strengthen the brake mechanisms that can be automatic or dynamic. In addition, we propose the creation of a subsidy fund to stabilize the agricultural sector in the EU by temporarily supporting EU farmers exposed to Ukraine's competition and helping them innovate or renew their production.

A new trade deal between Ukraine and the EU should even be more transparent about its content, in order to prevent manipulation by far-right parties and backsliding countries like Poland and Hungary.

This option helps safeguard cohesion and stability within the single market through a progressive and modular approach that avoids sudden shocks and reduces perceptions of unfairness among European farmers. The creation of a targeted subsidy fund reinforces solidarity with the most exposed sectors while ensuring fairness in competition conditions. The sustainability of this measure depends on the EU's ability to finance such compensations over the long term without jeopardizing budgetary balance. In terms of political feasibility, the option appears realistic as it combines market protection with support for Kyiv, thus reducing the risk of backlash from the most affected Member States that already happened during the last trade agreement between Ukraine and EU. Enhanced transparency in trade agreements strengthens social acceptability by limiting the political space for manipulation by Eurosceptic movements.

Policy Option 2: Reforming the Common Agricultural Policy (CAP) to adapt it to the integration of Ukraine

As Denmark takes over the Presidency of the Council of the EU and places the Common Agricultural Policy (CAP) among its top priorities, Ukraine's potential accession raises the need for a structural reform of the CAP. Ukraine alone represents 75% of the total agricultural land and 55% of the agricultural workforce among current candidate countries.¹⁶ Integrating such a prominent agricultural actor into a policy that already accounts for nearly one-third of the EU budget will require clear, balanced decisions, combining solidarity with financial responsibility.

A 7-year transition phase for direct payments is essential, just as it was during past enlargements, such as Spain in 1986 and Eastern Europe in 2004. Such a duration allows for alignment with a budget cycle, thereby avoiding an immediate budgetary shock for the CAP. As suggested by the SIEPS report, a gradual phasing-in would limit financial shocks, protect existing beneficiaries, and give Ukrainian farmers time to align with EU standards.

In parallel, the EU should introduce a lower cap than in the rest of the EU on payments per farm. Many Ukrainian farms are large and well-capitalised, and the standard of living is lower than in the rest of the EU. Without a cap, there is a risk that these large players would absorb most of the subsidies. The excess funds could instead support smaller farms through eco-schemes under the CAP's first pillar.

Finally, a share of direct payments should be redirected to a dedicated fund for green transition and compliance. This would help finance investments in sustainable practices and support Ukraine in meeting EU environmental, sanitary, and animal welfare standards.

Inspired by lessons from previous enlargements, this policy would ensure a fair and gradual integration of Ukraine, while protecting the CAP's future and the EU's food security. By ensuring a gradual transition for direct payments and introducing a targeted cap on aid, this option prevents economic imbalances between agricultural regions and limits distortions of competition. It thus strengthens the territorial, economic, and social cohesion of the Union by integrating the agricultural sector of a new Member State without undermining existing farms. It fully meets the requirements for solidarity and harmonious development of the territories set out in Articles 174 to 178 of the TFEU.

Policy Option 3: Limiting the movement of agricultural workers to protect farmer's jobs in the case of a further integration of Ukraine in the European single market

Key pillars of EU integration, as outlined in Chapter 2 of the European 'Acquis', are freedom of movement and the right to work across all Member States. Those rights would also apply to Ukrainians in the case of either full or partial integration of Ukraine into the EU, in line with the European Union's

¹⁶ Matthews, Alan. 2024. "Adjusting the CAP for new EU Members: Lessons from Previous Enlargements." SIEPS, September 2024.

commitment to equality. Due to the significant differences in wages, Ukrainians would be drawn towards the current EU Member States. For instance, the average monthly wage in the EU is around €3,155¹⁷, compared to approximately €517 in Ukraine¹⁸, highlighting the significant disparity in wages and the need for cohesive efforts in this matter.

It is worth noticing that nearly 4.3 million Ukrainians have been granted temporary protection status¹⁹, which allows them to reside and work freely across EU countries, showing a significant mark of solidarity before any eventual integration of Ukraine. Depending on the Member State, many of these Ukrainian refugees are already integrated into the EU labour market.²⁰

The migration of further agricultural workers from Ukraine to the current Member States in search of higher wages raises concerns. Nevertheless, this does not constitute a serious risk for cohesion, as the European agricultural sector is facing a growing labour shortage. As of 2020, at 57.6%, the majority of EU farm managers were aged 55 or older, while only 11.6% were under the age of 40.²¹

In this context, any attempt to restrict the free movement or employment of Ukrainian agricultural workers in order to protect domestic jobs appears neither credible nor justified to empower central European values, such as fairness and cohesion. On the contrary, their integration could help to sustainably address real labour market needs, illustrating solidarity.

Policy Option 4: Creating a 'Made in EU' label to inform consumers and temporarily advantaging EU farmers when integrating Ukraine into the European single market

European farmers' protests are demanding an end to unfair competition from agricultural products originating in non-EU countries. This endangers fairness and equality of market rules

between Ukrainian and European farmers. Clear labelling could be one way to achieve this. More than a submergence of the market with cheap Ukrainian products, the European agricultural sector fears an immediate equal treatment of Ukrainian and European products.

Similar to the sensitive products list, established in the ATMs by the EU to limit Ukrainian imports, the EU could go further and label its agricultural products as 'Made in EU'. This labelling would create a new quality standard based on the existing EU agricultural criteria as well as on a geographical requirement.

The label allows for the progressive integration of Ukrainian products if they comply with the European standards and Ukraine fully enters the Union, therefore preserving solidarity. This option would give time to European farmers to adapt, giving them a temporary advantage over Ukrainian products, both already in the market and thus joining it. This measure will be readily acceptable if it is conceived and implemented together with the farmers' unions, aiming for cohesion. As the EU already has labels such as the 'CE marking', it should also be feasible. Furthermore, it could serve for further enlargements of the EU, making it a sustainable tool for informing consumers and protecting European agricultural products from unfair competition, an option also countering international competition, e.g., Mercosur.

POLICY RECOMMENDATION

Having considered all the above, our policy recommendation is to develop a new trade agreement between the EU and Ukraine in order to gradually integrate Ukraine's agricultural sector into the European single market and avoid negative consequences for the EU's cohesion. The precise measures would consist of adding a new dynamic system of brake mechanisms to prevent the limit of importation being

¹⁷ Yanatma, Servet. 2025. "Average salaries across Europe: Which countries have the highest pay?" Euronews, June 2025.

<https://www.euronews.com/business/2025/05/06/average-salaries-across-europe-which-countries-have-the-highest-pay>.

¹⁸ Work.ua. 2025. "Salary statistics for Ukraine." As of August 2025. <https://www.work.ua/en/stat/>.

¹⁹ Eurostat. 2025. "Temporary protection for persons fleeing Ukraine – monthly statistics." As of August 5, 2025.

[https://ec.europa.eu/eurostat/statistics-](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Temporary_protection_for_persons_fleeing_Ukraine_-_monthly_statistics)

[explained/index.php?title=Temporary protection for persons fleeing Ukraine - monthly statistics](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Temporary_protection_for_persons_fleeing_Ukraine_-_monthly_statistics).

²⁰ IAB. 2024. "Labour market integration of Ukrainian refugees: An international perspective."

<https://doku.iab.de/forschungsbericht/2024/fb1624en.pdf>.

²¹ Eurostat. 2025. "Farmers and the agricultural labour force – statistics." As of November 2022.

[https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Farmers and the agricultural labour force - statistics](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Farmers_and_the_agricultural_labour_force_-_statistics).

exceeded, as experienced already between 2021 and 2023. It would also involve bringing Ukrainian products up to EU standards, introducing a 'Made in EU' label with specific qualitative parameters and a temporary advantage for European products. Additionally, this new trade deal should include special dispositions of the CAP, specially designed for Ukraine: a 7-year transition for progressive access to direct payments, a cap ceiling for direct payments per farm lower than in the rest of the EU, and a share of the direct payments dedicated to a special fund for green transition and compliance.

The benefits would be to avoid repeating the excess of a full liberalisation, while reassuring and associating European farmers in a transition process to ensure no one is left behind on the path towards Ukraine's integration. Our proposal ensures cohesion and fairness, while perpetuating the solidarity to Ukraine's economy and war effort as well as contributing to progressively preparing Ukraine's membership in the following years.

In contrast, we deliberately choose to exclude a limitation of agricultural workers' movement, which could actually complicate the necessary renewal of generations in the agricultural sector without responding to a serious threat to European cohesion. Restricting the free movement of agricultural workers would create unjustified segmentation of the labour market and hinder generational renewal in rural areas, contrary to the objectives of balanced territorial development. Such a measure would risk widening the gap between regions experiencing demographic tension and those with a labour surplus, thereby weakening the social and territorial cohesion of the Union, defined as goals for the EU in Articles 174 of the TFEU.

We consider a complete and immediate integration of Ukraine into the EU as not credible and enforceable, as it will lead to significant disruptions of the EU internal market and threaten EU cohesion, as it will need a considerable proportion of EU funds to be reallocated to Ukraine in order to balance its huge economic delay and lack of preparation. Furthermore, it would potentially flood the agricultural market with cheap Ukrainian products, endangering European farmers and fairness.

CONCLUSION

The integration of Ukraine's agricultural sector into the European Union represents a structural and political challenge that cannot be addressed through short-term and static

approaches. The recent application of Autonomous Trade Measures (ATMs) has demonstrated both the necessity of EU support to Ukraine and the risks of market destabilisation in the absence of appropriate mechanisms. A complete and immediate integration would not be credible nor sustainable, as it would generate significant distortions, threaten cohesion between Member States, and put additional pressure on already fragile rural economies.

A revised framework is therefore required. It should include a new trade agreement with reinforced dynamic safeguard clauses, a progressive alignment of Ukrainian products with EU standards within an EU label, and specific disposition of the Common Agricultural Policy (CAP) to accommodate Ukraine's specificities, particularly through a transitional phasing-in of direct payments, a differentiated cap on subsidies, and the creation of a dedicated fund for ecological compliance. Clear labelling instruments and transparent governance must accompany these measures to ensure political acceptability and legitimacy.

This approach reflects and reinforces the aforementioned fundamental EU values outlined in Article 2 TEU: solidarity with Ukraine during and after the war, fairness between current Member States and new candidates, equality regarding market rules and farmers' rights, and the promotion of cohesion as a critical goal to achieve. In this context, Ukraine's integration into the European single market can be successful and sustainable. It should be seen not as a threat, but as a lever to renew and strengthen the Union's cohesion, resilience, and strategic autonomy.

The Author(s)



NOÉ COLLOMB



DOMENICO MORELLI

Domenico Morelli is a master's student in International Relations at Sapienza University of Rome, specializing in supranational institutions. Academic interests focus on food security, environmental sustainability, and their connection to global governance. The research path builds on a solid background in Political Science and International Relations, with particular attention to the role of international organizations in addressing transnational challenges such as climate change, sustainable resource management, and equal access to food.



LÉO CHRISTOPHE

Léo Christophe is pursuing a Franco-German double master's degree in European Studies at the European University Viadrina and Sciences Po Strasbourg. He previously earned a Franco-German double bachelor of Political Sciences at the Leuphana University of Lüneburg and the IEP of Fontainebleau. He is fluent in English and German and a native French speaker. He has interned with the French Senate and National Assembly for members of Parliament and worked as a parliamentary assistant in the State Parliament of Brandenburg. Additionally, he has served as a student representative at various universities he attended and is a young ambassador for the Franco-German Youth Office (OFAJ/DFJW), where he is responsible for trilateral programmes. His main interests include Franco-German friendship, European cohesion and European integration (B.A. thesis on EU-Armenia interdependencies, which received the highest grade).

About the Project

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Email: contact@valeus.eu

Website: <https://valeus.eu/>