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From: General Secretariat of the Council  
To: Working Party on Frontiers

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Subject: Annual Risk Analysis 2024/2025

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Delegations will find attached Frontex's Annual Risk Analysis 2024/25.

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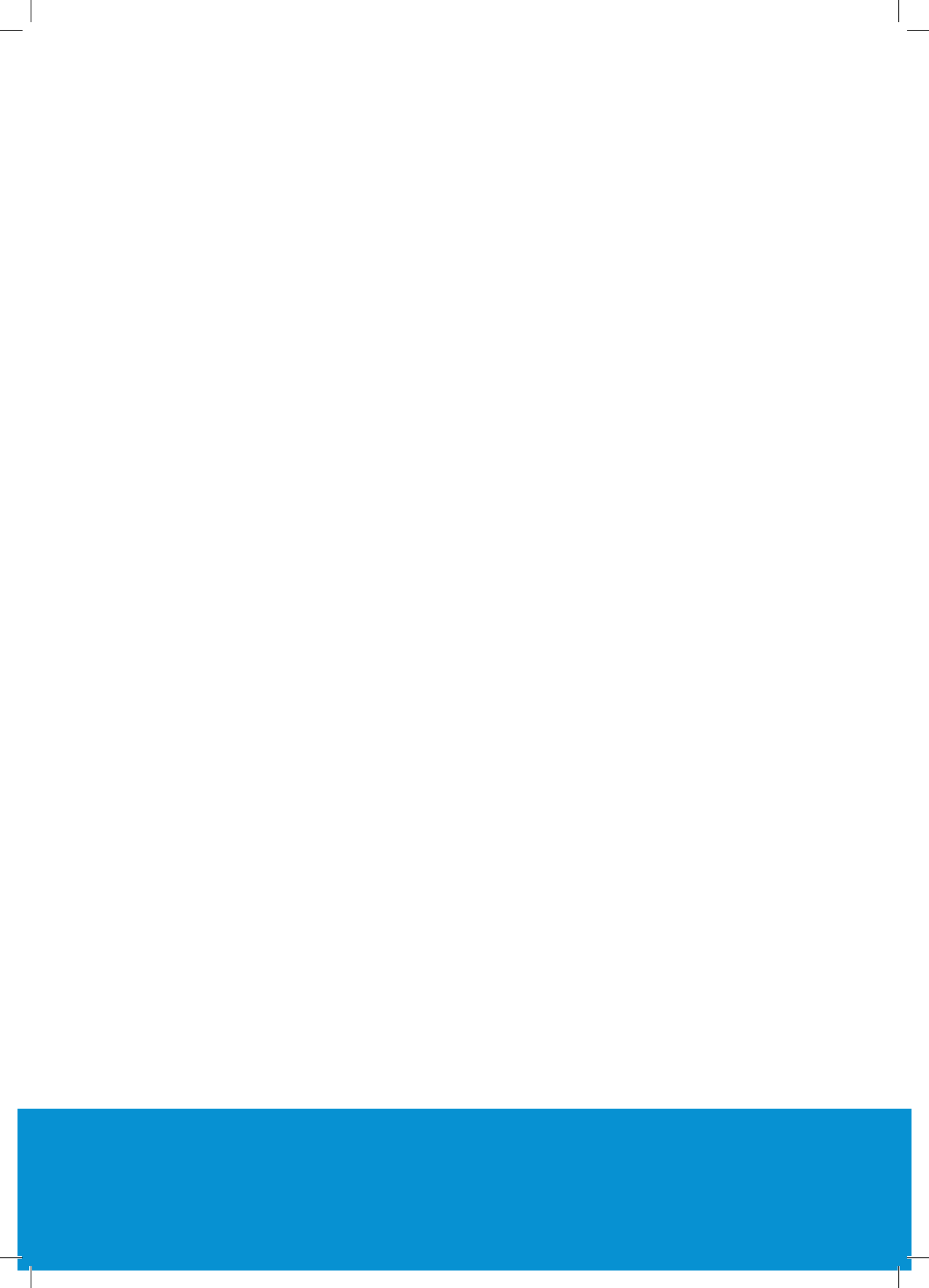


EUROPEAN BORDER AND  
COAST GUARD AGENCY



# Annual Risk Analysis 2024/2025





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# Annual Risk Analysis 2024/2025

European Border and Coast Guard Agency – Frontex, 2024  
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## List of Acronyms used

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<b>BCP</b>	border-crossing point
<b>CBRN</b>	Chemical, Biological, Radiological and Nuclear
<b>EBCG</b>	European Border and Coast Guard
<b>EES</b>	Entry/Exit System
<b>EIBM</b>	European integrated border management
<b>ETIAS</b>	European Travel Information and Authorisation System
<b>EU</b>	European Union
<b>Frontex</b>	European Border and Coast Guard Agency
<b>GPS</b>	Global Positioning System
<b>ID</b>	identification document
<b>ISIS</b>	Islamic State of Iraq and Syria
<b>ISIS-K</b>	the ISIS faction Khorasan Province
<b>JNIM</b>	Jama'at Nusrat al-Islam wal-Muslimin
<b>MS</b>	EU Member States
<b>OCG</b>	organised crime group
<b>SAC</b>	Schengen-Associated Countries
<b>THB</b>	trafficking in human beings
<b>UNHCR</b>	United Nations High Commissioner for Refugees
<b>UNSCR</b>	United Nations Security Council Resolution
<b>US</b>	United States of America

## 1. Foreword

I am proud to present the Frontex Annual Risk Analysis 2023/2024, which comes at a crucial juncture in the evolving landscape of European border management. The challenges before us are not only complex but also intertwined with the broader geopolitical and socio-economic transformations affecting our world today.

The past year has underscored the multifaceted nature of risks at the European Union's external borders. From the continuing ramifications of conflicts near our borders to the profound implications of climate change and the relentless endeavours of criminal networks, these challenges demand a nuanced and robust response from the European Border and Coast Guard.

Irregular migration remains a significant challenge, reflecting broader geopolitical instabilities. The war in Ukraine, tensions in the Middle East, and uncertainty in the Sahel have all contributed to migratory pressures on Europe. Each of these situations reminds us of the human cost of these crises and the importance of our work to manage Europe's borders with humanity and efficiency.

In response, Frontex has not only intensified its operational activities but has also deepened its commitment to innovation and strategic foresight. With the forthcoming EIBM Intelligence Policy we are maximising intelligence support to the entire EBCG, focusing on making informed decisions and setting clear priorities. This Risk Analysis is a step into this direction. The continuing expansion of the standing corps, gearing up for ETIAS and the enhancement of our technological capabilities are just three more examples of how we prepare to proactively meet future challenges.

Our efforts to secure the EU's external borders are fundamentally linked to our commitment to uphold the European values of dignity, respect, and human rights. In every operation, whether it be search and rescue missions at sea or making it easier for legitimate travel and trade, Frontex remains guided by these principles. Our operations are designed not only to manage borders but also to save lives and protect the vulnerable.



This year's Risk Analysis is refocused on the developments we foresee in the year to come. It is crafted to serve as a strategic guide for policymakers, operational leaders, and our partners both within and outside the EU. By understanding the dynamics at our borders, I believe we can better prepare for and respond to the challenges that lie ahead.

As I look to the future, I draw strength and inspiration from our shared commitment to a secure and open Europe — a Europe that is not defined by its challenges but by its capacity to manage them with resolve and respect for fundamental rights. Together, we will continue to safeguard the EU's external borders, ensuring that they are managed efficiently, humanely, and in a manner that upholds our collective security and values.

In this spirit, I invite you to engage deeply with the insights and analyses presented in this report, as they are crucial in shaping a responsive and responsible border management strategy for the European Union.

Thank you for your trust and continued support.

Hans Leijtens  
Executive Director

## 2. Executive summary

### **Among the risks to the external borders, irregular migration will continue to reign supreme**

For yet another year in a row, the outlook for geopolitical developments in Europe's direct environment with potential impact on European border management has decidedly turned more gloomy since last year's *Annual Risk Analysis*, with concerns on developments in the Middle East added to an already long list. Meanwhile, to the East the war in Ukraine and the prospect of renewed hybrid threats simmering in the background on the Belarusian border continue unabated, in fact the latter has been complemented by a rising threat on the Russian-Finnish border. To the South of the continent, it is large swaths of the Sahel that have in the last year been added to the long list of concerns of EU border management planners. This means the number of scenarios in which large-scale migratory events are fathomable (with little advance warning in the case of the East and the Southeast) in the year ahead has surged. Hence, contingency planning (with indeed *scenario-building*) and scaling up the rapidly deployable Standing Corps are imperative for the European Border and Coast Guard. In a situation of near-permanent crisis however, some Member States will also have to adjust staffing levels to the new realities.

Meanwhile, already initiated cooperation agreements with key transit countries to ramp up prevention activities will likely help to limit migrant flows on some of the well-established migratory routes, in particular the Mediterranean routes. Yet as time goes on, people smugglers will reorganise and adapt their *modi operandi* and therefore challenge the determination, capabilities and capacities of the respective authorities.

### **Hiding in plain sight**

As migrant flows from regions with a significant presence of terrorist groups rise, so does the threat of terrorists hiding in their midst. In times of polarisation of European societies over the Israel-Hamas war, European targets are even more attractive to terrorist groups expecting the inevitable societal backlash to help their recruitment efforts. On the other hand, the systematic performance of border checks based on biometrics and consistent,

vigilant border controls remain paramount in interdicting the movement of high-risk individuals (beyond terrorists, saboteurs, agitators and intelligence operatives in the escalating East-West tensions) and mitigating the associated risks for EU internal security.

### **More secure land borders may divert pressure to border-crossing points**

Sustained efforts to construct *technical obstacles* at key land borders are noticeable. They must be a part of a wider, multilayered system of operational and technical measures to ensure they contribute to the orderly management of borders. Their construction will in the year ahead contribute to the largest migratory flows materialising at the sea borders. The Western African and Eastern Mediterranean routes are most likely to see a rise in irregular migration figures. Meanwhile, more secure land borders may also drive up attempts to enter at border-crossing points (including to the newcomers to the Schengen area Romania and Bulgaria) hidden in vans, trucks and lorries or using fraudulent documents. The introduction of the Entry/Exit System (EES) and of the subsequent European Travel Information and Authorisation System (ETIAS) could equally lead to an increase in the aforementioned *modi operandi* at BCPs.

### **Cross-Border Crime predictably driven by the invisible hand of market economics**

Whether it is in the realm of drug trafficking in the Western Mediterranean or cigarette smuggling at the eastern borders, organised crime groups time and time again prove their ability to adapt to bring together supply and demand across borders despite the best efforts of border and customs officials to eliminate such activities. Among the trends of concern going forward, the *modus operandi* of hiding/blending/camouflaging contraband in legal flows of containerised transports and small parcel shipments is likely to be more frequently used by smugglers as part of their well-established cross-border crime enterprise. There is also a danger that trafficking in human beings (THB) will rise in the year ahead on the back of increasing displacements of vulnerable populations in key regions of origin.





Further south, Moldova will likely continue to be the victim of Russian hybrid campaigns including energy blackmail as well as political, and public opinion manipulations, with the October 2024 scheduled parliamentary elections in Moldova a probable target of cyberattacks and disinformation campaigns. Connected to the aforementioned, there are several low-likelihood, high-impact scenarios involving Moldova in which the EU's external borders could be impacted.

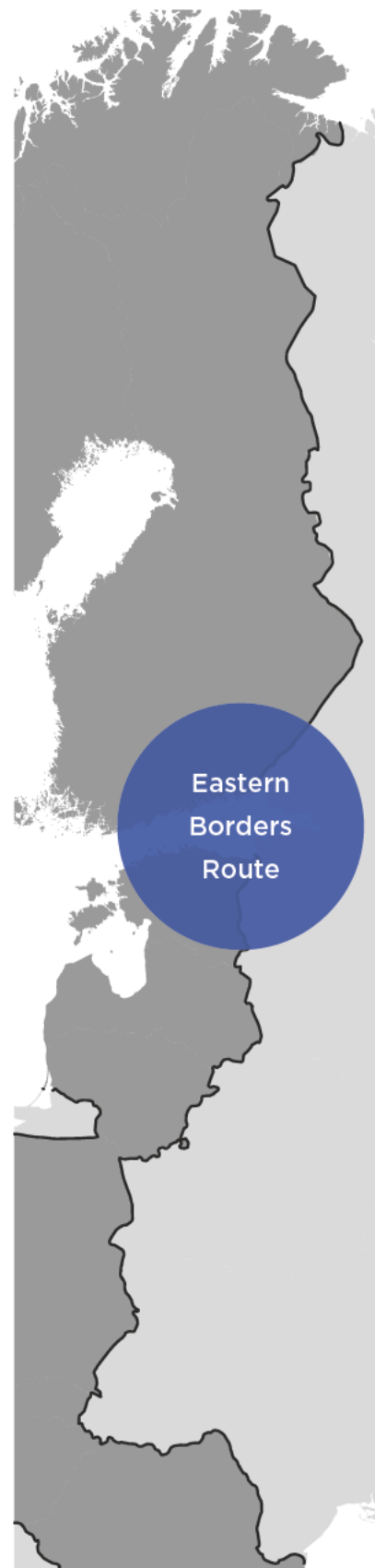
**Irregular land border-crossings on the borders with Ukraine will continue due to the ongoing war.** Martial law restricting freedom of movement of mainly men in Ukraine will likely continue to be applied and followed with new rounds of conscriptions. Further legislative changes tightening conscription parameters cannot be ruled out either. IBCs will likely continue to be made mainly by Ukrainian military-aged men due to fear of conscription. Increased border surveillance remains crucial to monitor the magnitude of the phenomenon. Unauthorised border-crossings on the EU/UKR land border of non-regional migrants will likely remain negligible as Ukrainian airspace as well as the land borders (except with EU) will likely remain closed and heavily guarded.

On the other hand, migratory pressure via Ukraine of third-country nationals has significantly decreased since the Russian invasion of Ukraine and the closure of air and land borders with Belarus and Russia. This will not change in the nearest future as all previously well-established migratory route via Ukraine towards the EU will likely remain unavailable.

**The risk of weapons smuggling from Ukraine will likely remain low** with mainly foreigners carrying some pieces of weapons and ammunition from Ukraine as souvenirs. However, the risk may increase once the war is over, providing the possibility for firearms to become widely available, including to organised crime groups, strongly depending also on the duration and eventual resolution of the conflict.

Amendments to the Criminal Procedure Code of Ukraine criminalising the smuggling of goods represent an important factor in the fight to further limit goods smuggling activities, although criminals may end up increasing their usage of less traceable smuggling methods such as drones.

Goods smuggling activities on the EU-Belarusian border are likely to further decrease due to enhanced border-control measures imposed by the EU MSs facing instrumentalised migratory flows from Belarus. Truck traffic restrictions, the limited number of BCPs open for freight traffic and enhanced controls for monitoring of EU sanctions might lead to a change in *modi operandi* or routes used by OCGs involved in the smuggling of goods.



## 5. South-eastern borders

**The Western Balkan migration route will continue to largely reflect developments in the Eastern Mediterranean as non-regional migrants are mostly unable to fly into the region to continue their journey. Particularly manifold pressure on Afghan and Syrian migrant populations as well as the risk of regional escalation posed by the conflict in Gaza, in addition to enduring conflicts and economic downturns in neighbouring regions will likely show themselves to be the main concerns to the Eastern Mediterranean route.**

The Eastern Mediterranean and Western Balkan regions remain largely interconnected from the perspective of migration. **The flows affecting both areas will directly and indirectly continue to be affected by the developments in key source and transit areas further east.**

As regards the **Eastern Mediterranean route**, it is likely that Afghan and Syrian migrants will continue to constitute the largest groups of irregular migrants on this route. Both at home but also in particular their displaced populations face manifold pressure.

Pakistan and Iran each host upwards of 3 million displaced Afghans and both countries have reportedly increased their efforts to repatriate unregistered/undocumented individuals. The measures came in the context of security concerns, economic pressures and ahead of national elections organised in early 2024. Pakistan's measures were expected to impact some 1.7 million unregistered

Afghans. Meanwhile Iran also reportedly returned some 1.2 million Afghans in 2023 (circular movements are likely), while continuing to ban them from settling in 19 of its 31 provinces. The stance on hosted Afghans, feeding push factors for migration, seems likely to endure amid ongoing pressures (in Iran a hard-line conservative legislature facing an economic downturn and renewed western sanctions amid the conflict with Israel and a rising insurgency, in Pakistan enduring security concerns and a coalition government with limited scope for reform). This can significantly influence westward migratory movements, although this can be partly mitigated by seasonal factors influencing the crossing of the Ararat mountains as well as the enhanced efforts to tackle irregular arrivals in transit to and in the Eastern Mediterranean region.

In Syria, economic hardships will continue to add to a complex socio-political, administrative and security



environment, sustaining prospects of localised destabilisation in various regions of the country, to further feed already active push factors for migration. These factors can affect the local Syrian population as well as the individuals returned from the immediate region (as key host countries are confronted with their own pressures and increasingly focus on returns).

Lebanon hosts between 1.5 and 2.2 million Syrians and between 270 000 and 500 000 Palestinians while being confronted with a severe economic crisis as well as security concerns stemming from simmering Hezbollah-Israel tensions. Ongoing instability also decreases the attractiveness of the country's tourist industry, adding further strain to its economy. All these factors affect the local population as well as hosted refugees, limiting access to essential services and basic goods and causing living conditions to deteriorate. Enduring hardships also feed anti-migrant sentiments and raise prospects of forced returns adding to an already deteriorating environment for hosted migrants. In this context and amid a decision to no longer accept non-Lebanese returns, Cyprus experienced a rise in sea arrivals on its territory in early 2024. **EU support in the year ahead can mitigate migratory outflows as it can gradually reduce the push factors while also improving the authorities' border management capacities.**

Meanwhile, the Israel-Iran shadow war has intensified since October 2023, even escalating to episodes of direct attacks in April 2024. While the direct attacks showed general restraint on both sides, tensions endure alongside concerns of escalating proxy skirmishes across the region, even beyond the existing spheres with potential impacts on IBM. From the EU border management perspective, Syrians and other nationalities hosted in the wider region could be pushed to migrate, as the economic hardships and uncertainties they face (i.e., in Lebanon, Syria, and Türkiye plus prospects of returns to Syria) are further exacerbated by the conflict. Instances of nationality swapping can occur as migrants may hope for various benefits if they claim to have come from conflict-stricken areas.

In brief, the likelihood that irregular migration on the Eastern Mediterranean route will continue to be affected by geopolitical factors, enduring tensions, conflicts and economic downturns in neighbouring regions is high. The instability in the Middle East, economic hardships and uncertainties in Lebanon, Syria, and Iraq, exacerbated by the Israel-Iran shadow war (which can galvanise Iranian proxies and security concerns across the region), coupled with a growing push by Pakistan and Iran to remove Afghans, are key factors which can influence arrivals in the Eastern Mediterranean. This may also contribute to offer people linked to terrorism the opportunity to mix among

the migratory flow and strengthen avenues of cooperation between criminal and terrorist networks operating in the area. **Ongoing partnerships with key transit countries will remain a key factor to mitigate arrivals.**

The Western Balkan region's southern borders will remain key entry points for migrants looking to move from the Eastern Mediterranean towards various destinations in Western Europe. Reinforced border controls aimed at tackling irregular migration and addressing security issues throughout the Western Balkans will continue to hinder onward movements. Still, migrants are likely to keep searching for alternative routing (flow redirections) or travel options. The re-routing on top of the already existing competition between smuggling organisations in the region will likely lead to a continuously high level of aggression and violence between the actors, towards the migrants and, where necessary to successfully operate, towards border guards. [REDACTED]

[REDACTED] On the other hand, effective prevention efforts in this region can influence the migrants' prior routing towards the region.

Limited return options and the misuse of the open nature of reception facilities lead to migrant build-ups in various parts of the Western Balkans in a context of reinforced border controls which prevent onward transit. These build-ups sustain the elevated pressure on certain borders as migrants engage in multiple crossing attempts, while also raising security concerns (i.e., detections of firearms in irregular migrant settlements have been observed since mid-2022).

The Western Balkan region's northern borders with EU MSs will remain key pressure points affected by migrant attempts of onward movements. While reinforced controls on the Serbian-Hungarian border have effectively curbed movements towards Hungary since November 2023, deflections towards Bosnia and Herzegovina-Croatia or other exit areas such as Serbia-Croatia may become accentuated with time (i.e., once migrants/smugglers manage to reorganise and find alternative routings alongside improved mobility in spring and summer).

The actions at the key exit points can also affect travels/ cause deflections in the more southern parts of the route across the region (e.g., as migrants try to avoid journeys to northern Serbia some re-routings can occur as for example via North Macedonia - Kosovo/Albania - Montenegro).

The gradual alignment of regional partners' visa policies to that of the EU has proven effective in curbing migration by key misuser nationalities. Some nationalities which

<sup>1</sup> This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

remain visa-free in the region (e.g., Türkiye, China, and Russia) could nonetheless increasingly misuse this right in the future, driven by developments in their countries or in the wider geopolitical context.

Amid enhanced border-control activities throughout the focus regions, migrants will continue searching for alternative travel options. Smugglers can try to capitalise on this search by offering their services in various forms, from guidance across green borders, clandestine crossings at BCPs, the provision of false travel documents to onward transportation, thereby contributing to various deflections of flows across the region.

Besides constantly adapting facilitated irregular migration flows, weapon smuggling will continue to challenge the border management in the region. While the Western

Balkans are known as an important source of post-conflict weapons, the whole region will be increasingly a transit area towards central and east Europe especially for weapons smuggled from Türkiye, the main source country of blank-firing weapons, which can be easily converted into live-firing firearms.

Overall, the **coherent/cascading reinforcement of border-control activities across the wider region remain necessary**, as they are the best option to ultimately reduce the overall attractiveness of transiting the area through irregular means and pre-empt any wild-card scenarios such as sudden mass flows amid ongoing instability in key source/host countries, which could offer high-risk individuals viable options to exploit the migratory flow to reach the EU external borders.



## 6. Southern borders

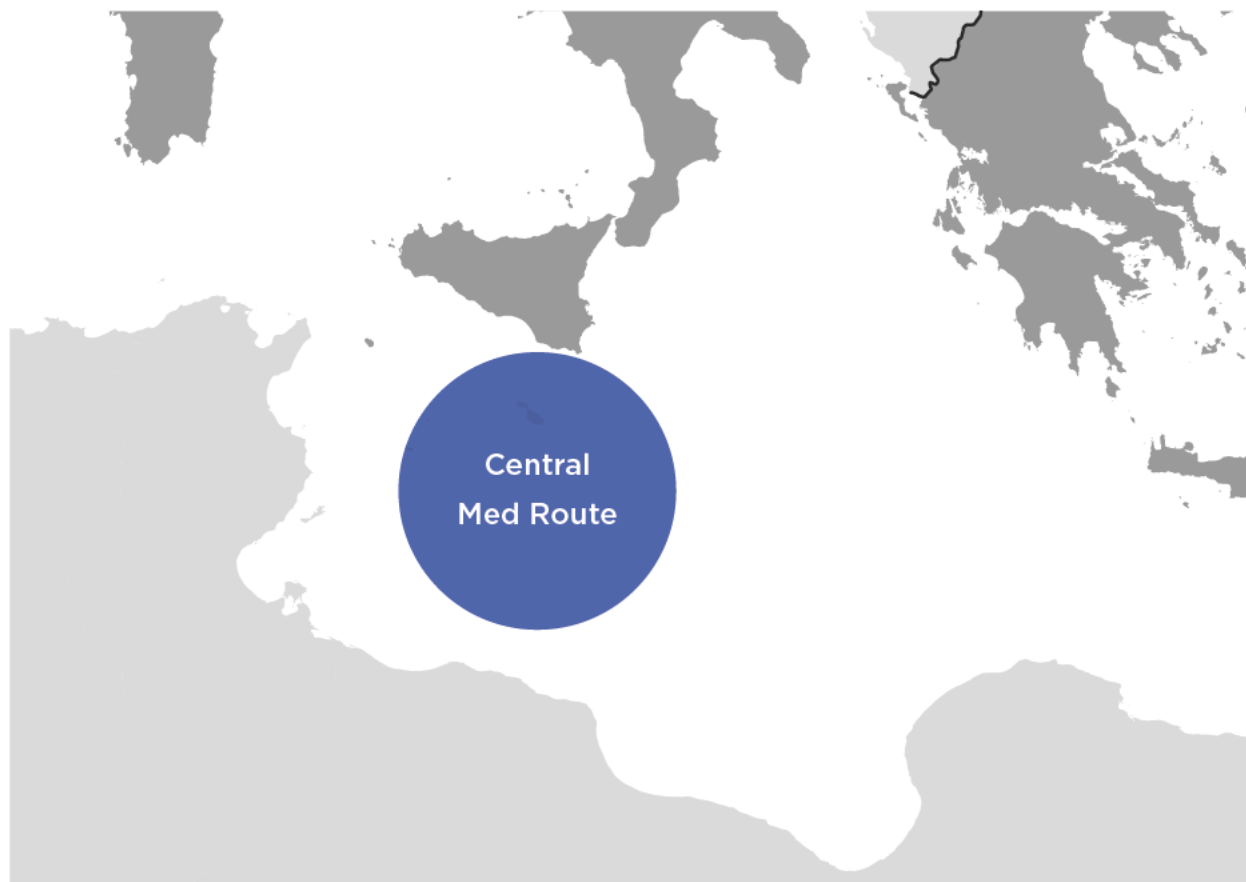
**In the South, the Central Mediterranean route will experience the knock-on effects of several large-scale displacements in the sub-Saharan region. The spread of terrorism in the Sahel is both a cause and effect of regional instability and demands vigilance in preventing undetected entries and in thoroughly screening irregular migrants on entry from the region.**

In the coming year, migratory flows in the Central Mediterranean will continue to reflect the migratory movement of migrants stemming from North Africa itself, joined by transiting migrants from sub-Saharan Africa as well as migrants mainly from South Asia that are able to use air routes into the region. The Central Mediterranean will also continue to see migrant vessels departing from various locations in the Eastern Mediterranean region. In simpler terms, the flows affecting the Central Mediterranean route will continue to closely reflect developments in key countries of transit and origin.

**Migratory pressure will likely remain high in the Central Mediterranean** due to migrants from sub-Saharan Africa finding that traditional routes northwards through the Sahel have been revived and the likely unimpeded ability by certain nationalities (Bangladeshi, Pakistani and Syrian nationals are likely to continue to be prominent but could well be joined by new nationalities) to fly to departure

areas in North Africa. That said, figures in the Central Mediterranean will possibly fall short of the 2023 peak owing to determined prevention efforts by key regional transit countries bordering the Central Mediterranean to the South. That however does not mean that smuggling networks will not successfully adapt their *modi operandi*.

It is likely that **Niger will re-gain its key role as a transit country to the north** of the continent and thus towards the Central Mediterranean migratory route. Following the coup in Niger in July 2023, and the agreed withdrawal of foreign troops who collaborated with Nigerien forces on counterterrorism efforts, Niger's military junta has announced a partnership with Russia. As part of this rhetoric, toward the end of 2023, Niger repealed its anti-smuggling law that aimed to curb irregular migration through the country. By doing so, Niger's military junta has officially reopened migratory routes through the country and, consequently, has reinstated Agadez as the



main migration hub for sub-Saharan migrants who intend to cross the Mediterranean to reach Europe. Economic hardship may push more Nigerien nationals to engage in migrant smuggling activities. In terms of push factors, the security situation – along with socioeconomic factors – in sub-Saharan countries may further increase migratory movements to Niger. Further from Niger, would-be migrants may decide to join migrant stocks in North Africa in the short to medium term.

**In Sudan, the civil war shows no signs of abating and will likely continue to result in the displacement of people, including to the north of the African continent.**

The outbreak of the civil war in April 2023 resulted in the world's largest internal displacement crisis. By the end of 2023, over 2 million people had fled to neighbouring countries, mostly to Egypt and Chad, while over 6 million individuals had been displaced internally within Sudan. Factors fuelling the crisis in Sudan comprise political turbulence, a socioeconomic downturn marked by soaring inflation and currency devaluation, and widespread food insecurity impacting at least a quarter of the population, with projections indicating further deterioration. The effects of the civil war may endure beyond the coming year, even if international efforts to de-escalate the conflict prove successful.

**Russia has arguably expanded its influence in Africa in recent years more than any other external actor.** These engagements extend from deepening ties in North Africa and expanding its reach in the Central African Republic and the Sahel. It is likely that Russia will continue to expand its reach by whatever means possible such as deploying mercenaries, spreading disinformation, interfering in

elections, supporting coups, and supplying arms etc. to gain influence on the continent in the future. The outcomes from Russia's interventions in Africa are likely to have far-reaching implications for democratic governance norms and security on the continent. The Russian engagement on the continent may in itself constitute a push factor, for instance if the support it deploys to regional potentates is unable to effectively counter jihadist extremist groups expanding their presence. The latter may consolidate their grip on the territory, and start focusing on more long-term objectives, like projecting the threat beyond the region. Importantly, with the influence Russia builds on the continent comes the ability to create and possibly steer migratory flows, the effects of which could potentially be felt in the years to come.

Amid a complicated geopolitical context, **Africa's 'coup belt' has become a thriving place for violent extremist groups**, including the Islamic State in West Africa Province (ISWAP) and Jama'at Nusrat al-Islam wal-Muslimin (JNIM). According to the Global Terrorism Index, the epicentre of terrorism has now conclusively shifted out of the Middle East and into the Central Sahel region of sub-Saharan Africa. There were just under 4 000 deaths from terrorism in the Sahel in 2023, or 47% of the total worldwide. In the Horn of Africa, al-Shabab continues to demonstrate its ability to carry out various types of attacks across different geographical areas.

The continuously expanding terrorist threat emanating in the South means that **undetected entries of people linked to terrorism at the external borders will likely remain of grave concern for the internal security of the Union.**

## 7. South-western borders

**While in the Western Mediterranean, expectations of North African partners' sustained prevention activities and effective criminal prosecutions of people smugglers mean the migratory pressure is anticipated to remain moderate and stable, adverse developments in the Sahel will probably, despite the best efforts by an expanding set of regional partners, mean the Western African route will see further peaks in migrant arrivals.**

In the **Western Mediterranean**, the fight against irregular migration by third countries will remain crucial for this route. Despite this, people-smuggling groups operating from North African shores have adapted efficiently, increasing their reputation and continuously attracting migrants. Seasonal fluctuations in migratory pressure are expected in the coming months, but **overall annual figures are anticipated to remain stable.**

In the coming year, no significant changes are anticipated in relation to the most common nationalities that will be detected on the Western Mediterranean route, with North

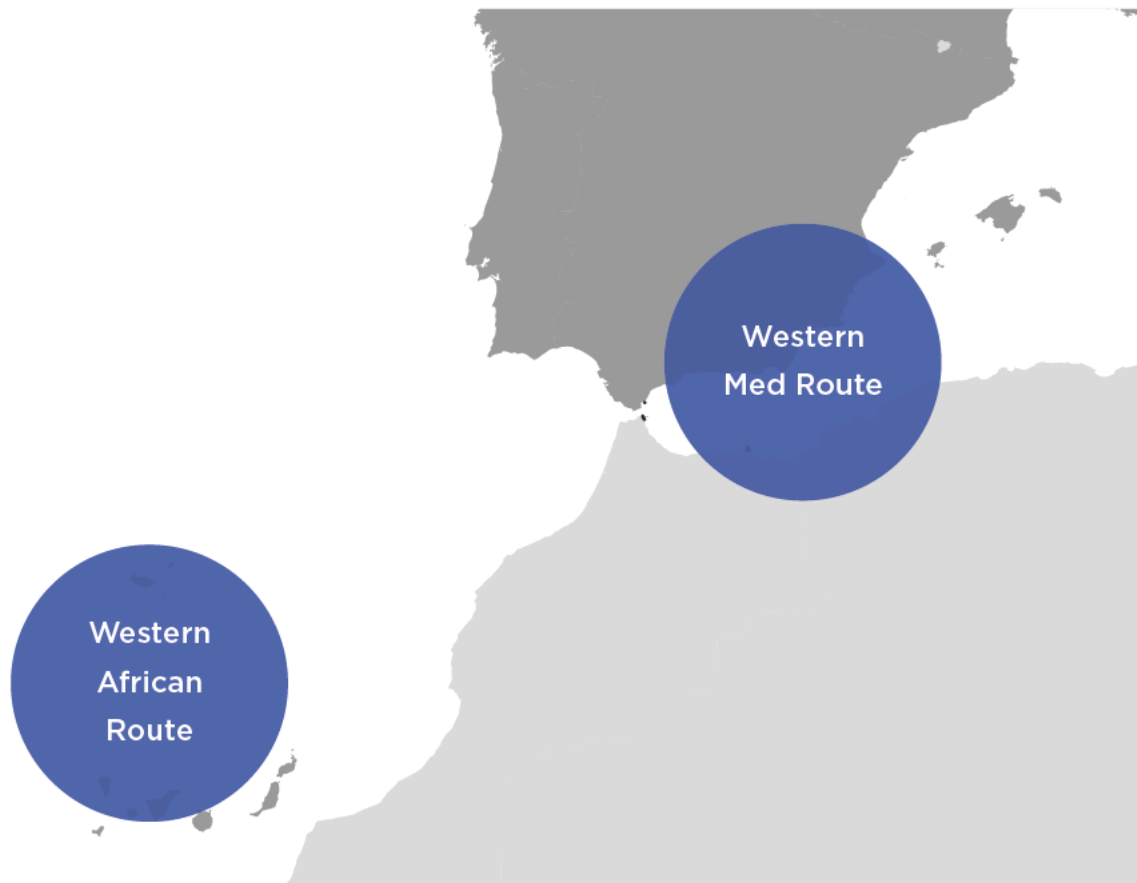
African migrants accounting for a significant portion on this route with smaller numbers of other nationalities. Although sub-Saharan African migrants are present in the countries adjacent to the Western Mediterranean, efficient patrolling activities, the preference of people-smuggling groups to facilitate primarily north-African nationals in an effort to avoid detection and the high smuggling fees make sea crossings less affordable for them. However, they may attempt risky crossings at the land border thereby endangering their own lives.

The Western Mediterranean Sea route is primarily chosen by residents of coastal areas where most people smugglers operate. Strict land and maritime patrols by these countries' authorities make it difficult for other nationalities to stay in coastal areas and contact smugglers without being detected. When smuggling networks face increased challenges from the local authorities, they refer would-be migrants to people smugglers operating on other corridors, even in other countries. Additionally, migrants from the Middle East use Algerian smuggling networks to reach Spain via sea, travelling first to Algeria via air routes through Libya and then overland with smugglers' assistance.

Conversely to the past, in recent years, sub-Saharan African migrants have chosen the Western African route instead of the Western Mediterranean route using land routes from their countries of origin. Smuggling fees on the Western African route are lower and smuggling networks have been established along land routes to facilitate migrant movements. Both the routes towards Spain are interconnected and influenced by geopolitical factors, economic conditions, and regional dynamics. Therefore, in line with this, **changes in one route can affect the other looking forward.**

In recent years, the main transit countries of significance to the region have intensified their efforts to curb irregular migration, resulting in a notable decrease in migratory pressure on the Western Mediterranean route. Third countries' actions are pivotal in deterring irregular departures from their shores. While current resources are not unlimited, these countries are expected to maintain their efforts at a consistent level. Any changes in the factors influencing departure countries' measures such as push factors in terms of migration, and regional cooperation, could potentially affect migratory pressure on this route.

People smugglers operating in the departure countries will likely continue to employ complex *modi operandi* to ensure that migrant boats reach the shores of mainland Spain without detection, a service they are able to charge higher fees for. This might allow individuals of interest to blend in with irregular migrants, exploiting migratory flows to reach the EU undetected, evade apprehension, and potentially engage in illicit activities.







On the **Western African route**, the number of incidents and the dynamics of the departures indicate the existence of well-structured smuggling networks that can swiftly respond and adapt to preventive measures implemented by the authorities of the regional coastal states, continuously testing their border management capacities. The length and duration of the journey along the Western African route, the perilous sea conditions, and the lack of experienced skippers dramatically increase the risk of fatalities on this corridor.

Migration from West Africa will continue to be driven by economic, political, and security factors, as well as individual perceptions and opportunities. Recently, groups of people smugglers extended their area of operation southwards in West Africa and across national borders, signs of adaptability which will make them more resilient against the efforts of individual law-enforcement authorities and prevention activities.

Challenging socioeconomic conditions in the West African region, aggravated by environmental changes, keep pushing many people to leave the region. Potentially increasing migratory movements, especially from the Sahel, towards the West African coast together with the lower fees charged by people-smuggling networks - compared with the smuggling fees on the Western Mediterranean route - could further increase the number of facilitated crossings on the Western African route. In this context, this route will most likely continue to be one of the main gateways to the European Union, **with increasing migratory pressure along this route expected in line with seasonal patterns.**

Endemic violence in the Sahel, in tandem with the socioeconomic situation, increases displacement and creates fertile ground for criminal and terrorist groups to strengthen ties through the exploitation of migratory flows for financial gain and the recruitment of individuals. In this context, migratory pressure on the Malian-Mauritanian border may further increase, fuelled by nationals of Burkina Faso and Mali. This could result in more sea crossings on the Western African route. It can also offer an opportunity for criminal elements or individuals with background which may be related to terrorist groups to mix in with migratory flows to the EU.

People-smuggling networks have extended their influence to include accomplices on the destination islands who support the irregular migrants after their disembarkation and provide facilitation to the mainland. Before the sea crossings, people smugglers provide the irregular migrants with contact information for these accomplices on the Canary Islands. The established inter-continental business model indicates that the fight against those criminal groups involved in migrant smuggling will continue during the coming year.

Looking beyond regional developments, European and also third country authorities have introduced enhanced measures to prevent migrants abusing the visa regime. These migrants, originating mainly from the West African region, wish to enter the US via South and Central America. The enhanced measures might result in diverting the would-be migrants to the Western African route over the next year.

While Western Mediterranean continues to record major detections of drug smuggling, large cocaine seizures in littoral Western African nations in 2023 support the claim that the **region is becoming an important hub for the trafficking and storage of cocaine originating from Latin America and arriving via maritime routes**, a development that may continue during the next year. In this regard, cocaine trafficking via the Western African route represents a lucrative source of income for criminal networks along the smuggling route to European markets.

## 8. Outlook

### The polycrisis has arrived in full force

Looking into Europe's immediate future, even optimists will have to acknowledge that Europe finds itself in a geopolitical neighbourhood plunged into war and crisis, as well as geopolitical competition. In the coming year, there is ample potential for additional instability in Europe's direct proximity, not just in the Middle East, but also for instance in the Western Balkans, the Caucasus, West Asia and the Sahel. Consequently, European integrated border management has to adapt to the age of the polycrisis. This implies the necessity to be ready to deploy the Standing Corps at scale in multiple locations simultaneously, that Member States and the Agency create solid and strong contingency plans and boost needed capacities throughout the system. As stable, reliable partners in direct proximity are fewer in number, and with threat multipliers such as climate change already proving to be hard at work behind the headlines of climate disasters, it is only through resilience and strength that the European Border and Coast Guard will persevere in this increasingly hostile environment.

A relative newcomer to the headaches of border management planners is the conflict in Gaza: its wider regional reverberations come on top of lingering concerns in the region about political instability, augmented socioeconomic push factors, as well as in some communities increased antagonism towards hosted migrants. The prospect of the crisis escalating into a regional conflict, on top of other push factors, recently pushed Syrians to sail towards EU territory from Lebanon, and this (happening on a larger scale) is where one of the concerns lies going into the near-term future, beyond an outpouring of refugees from the territories at the core of the ongoing conflict should paths to the well-established migrant corridors in the Eastern and Central Mediterranean be opened. The threat of terrorists blending in with migrant/refugee flows in this scenario is considerable.

In addition to the newer crisis hotspots, there are manifold ongoing conflicts that remain of acute concern for European border management in the year ahead: The war in Ukraine in its third year continues to hold a number of scenarios that may unfold bearing serious implications for EU border management. Amongst them are renewed Russian territorial gains of significance, an unfavourable settlement forced on Ukraine by a new US administration or drastic new draft measures. On the other hand, it is fathomable that the stability of the Russian (or indeed Belarusian) regime may yet again be challenged in the year ahead, in such a scenario one could imagine a course of events that would lead to an outflow of Russian

nationals, including to the West, directly and indirectly (via for instance the Western Balkans).

On the African continent, political instability and the proliferation of jihadist groups in the Sahel is increasingly concerning from the European border management perspective. These factors join socioeconomic push factors that are encouraging a steady flow of migrants from the continent. To make matters worse, food insecurity and water stress will likely only deteriorate in the year to come – driven by extreme weather events – due to the recurrence of the El Niño climate pattern. Standing out, at a staggering scale, among the factors driving displacements in the Sahel is the conflict in Sudan (the UNHCR as of 28 April 2024 counts a total of 8.7 million Sudanese forcibly displaced, over 1.8 million of which are outside Sudan). Of those, few will immediately have the means to move larger distances or to pay for facilitation towards Europe, yet as time goes on a small share (of the aforementioned large number) will be able to accumulate these means. On the other hand, Sahel countries such as Mali that were once committed to curbing northward flows through the region are now lacking the resources or determination to implement mitigation measures or are outright backsliding on such policies.

### Hybrid threats and terrorism remain top of the agenda

Apart from 'naturally' occurring migrant flows, deliberate efforts by state actors hostile to the European Union and its Member States to instrumentalise migration will likely continue, if not intensify, in the coming year. The events at Finnish border-crossing points towards the end of last year attest to the keen interest on the part of the Russian Federation and Belarus in stress-testing particular sections of their extensive western borders with their EU and Schengen neighbours. The next Russian-orchestrated hybrid threat could be at the green border or via one of its proxies to Europe's South.

The threat posed by terrorists blending in with mixed migratory flows is likely on the increase against the backdrop of the polarisation of European societies over the Israel-Hamas war. While in recent years, terrorist attacks/threats in the EU have primarily materialised in the form of lone actors, most of them operating without any formal links to a terrorist organisation, the Crocus City Hall attack in March remind the reader that larger-scale attacks remain the ambition of groups such as ISIS-K. Consequently, upcoming major sporting events hosted in Europe may be at risk. Ensuring the systematic performance of border checks based on biometrics and consistent, vigilant border controls employing risk profiles remain paramount in interdicting the movement

of high-risk individuals and mitigating the associated risks for EU internal security.

Despite the abovementioned disconcerting factors that might suggest the upward trend of IBCs on entry is set to continue in the year ahead, it is not certain that the number of irregular entries will rise as a flurry of new agreements with major transit countries have recently been signed. These new deals are already visibly increasing prevention activities and will to some degree also in the longer run endow these partners with the capacities and capabilities to interdict migrants leaving from their shores. That said, people smugglers, which are involved in significant proportions of irregular migration, have already in the past shown great skill at adapting their *modi operandi*. Furthermore, as an unintended consequence, some of these countries may host larger migrant populations with their final destinations in Europe, increasing their ability to put pressure on the EU and its Member States at will. Taken together, the two previous points would suggest efforts to strengthen the second tier of the four-tier access control model on their own cannot replace the adequate resourcing of the third tier, crucially comprising elements such as border control capacities and a well-trained European Border and Coast Guard.

While the provisions of the new *Pact on Migration and Asylum* will not enter into force in the year ahead, it would be well in line with well-established patterns to see people smugglers pointing to the Pact to boost their business activities. Hence, early-on signs of unintended

consequences of the Pact, in particular migrant departures towards Europe being brought forward, may well materialise over the next year.

#### **Cross-border crime preying on the vulnerable**

The cross-border crime dynamics ahead will on the one hand likely be driven by the above-described displacements creating vulnerable populations exposed to organised criminal activities such as migrant smuggling and the risk of subsequent labour and sexual exploitation. On the other hand, the sustained demand for illicit markets provides opportunities for criminal actors to smuggle various commodities across borders, including drugs. There is an increased risk that smugglers, employing evolving tactics, will move contraband goods across sea, land, and air borders. Adjusted routes and camouflaged contraband hidden in legal flows of containerised transports and small parcel shipments may be amongst these *modi operandi*.

#### **Strategic Risk Analysis 2024 as essential reading for a longer-term perspective**

Looking beyond the 1-year horizon, the Agency's forthcoming *Strategic Risk Analysis* with its 10-year time horizon develops scenarios of European Border Management until 2034 under the influence of megatrends such as increasing demographic imbalances, accelerating technological change and hyperconnectivity and widening inequalities, to name but a few. The ensuing best-case, baseline and worst-case scenarios are complemented by a piece detailing a hybrid threat scenario.



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