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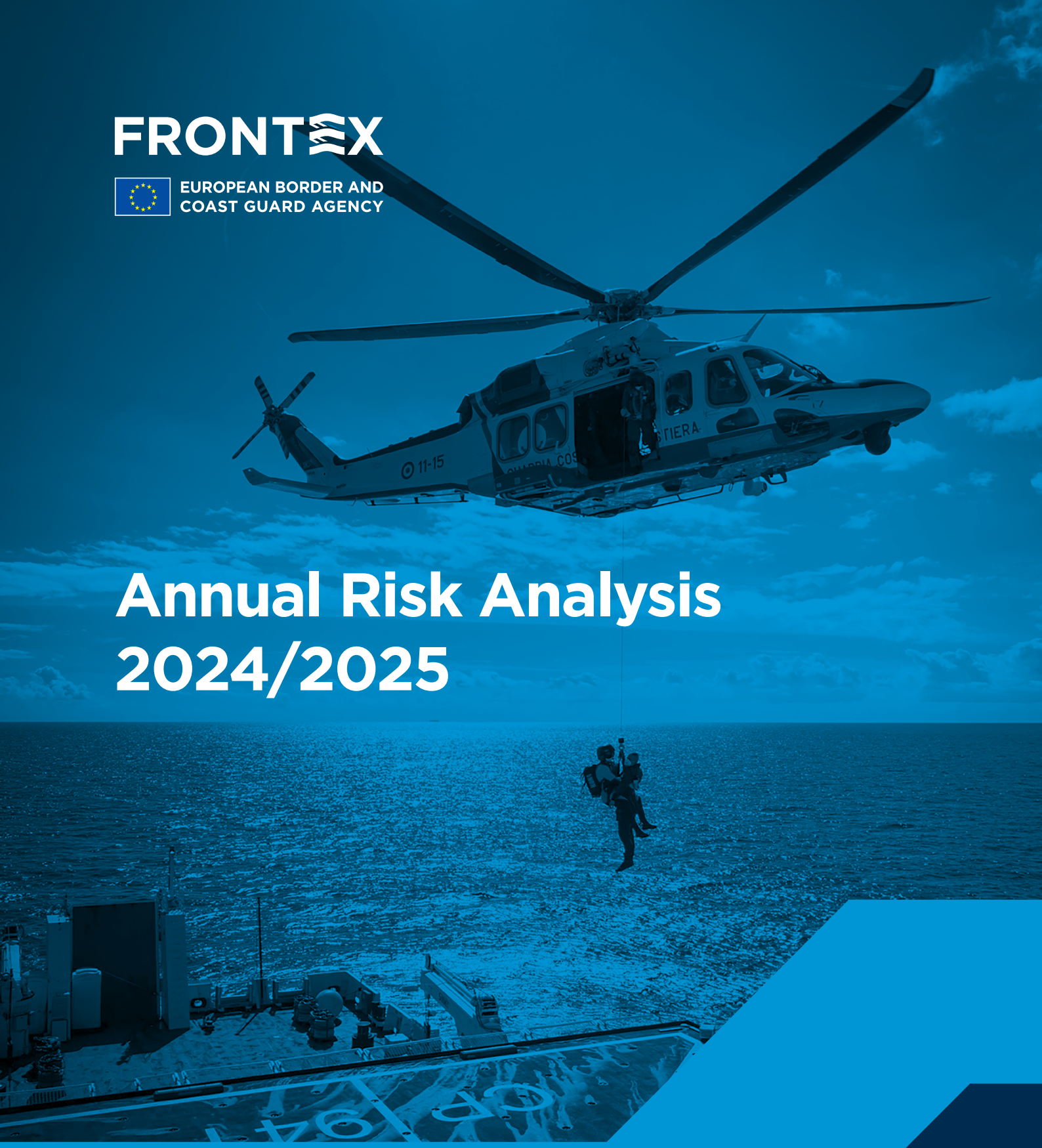
EUROPEAN BORDER AND COAST GUARD AGENCY



Annual Risk Analysis 2024/2025

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

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

The Risk Analysis is 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

Irregular migration will continue to be the main risk

The outlook for geopolitical developments in Europe's direct environment with potential impact on European border management has turned decidedly more gloomy since last year's *Annual Risk Analysis*, with developments in the Middle East added to an already long list of concerns. Meanwhile, to the East the war in Ukraine and the prospect of renewed hybrid threats 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, large swaths of the Sahel 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 feasible (with little advance warning in the case of the East and the Southeast) in the year ahead has surged. Hence, contingency planning (including 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, cooperation agreements signed 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 present new challenges to the determination, capabilities and capacities of the respective authorities.

High-risk individuals pose an increasing threat

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 more attractive to terrorist groups, who can use the inevitable societal backlash to help their recruitment efforts. Continuous systematic border checks based on biometrics and consistent, vigilant border controls remain paramount in preventing the movement of high-risk individuals. Beyond terrorists, such individuals can include saboteurs, agitators and intelligence operatives in the escalating East-West tensions.

More secure green borders may divert pressure to border-crossing points

Over the past year numerous efforts have been made to construct and modify technical obstacles at key land borders. These efforts must be a part of a wider, multilayered system of operational and technical measures to ensure they contribute as effectively as possible to the orderly management of borders. If they prove effective, in the year ahead these obstacles will mean that the largest migratory flows will be 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 green 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 clandestine entry attempts at border-crossing points (BCPs).

Cross-border crime remains driven by market forces

Whether in the realm of drug trafficking in the Western Mediterranean or cigarette smuggling at the eastern borders, organised crime groups time and again prove their flexibility in bringing together supply and demand across borders despite the best efforts of border and customs officials. Among the concerns 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. 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.

3. Introduction

The Annual Risk Analysis (ARA) 2024/2025 presents key risks to the EU's external borders for strategic decision-making based on a new regional approach. It departs from previous editions in that it is exclusively focused on the risks that may arise *on entry* to the EU within a time horizon of one year from the time of writing (Q2 2024 – Q2 2025).

The report culminates in conclusions on the overarching risks. The analysis of different risk categories, including cross-border crime and terrorism, provides a comprehensive picture of future challenges and threats that jeopardise the security and functioning of the EU's external borders.

4. Eastern borders

Nowhere else at the external borders is geopolitics a stronger determinant of migration as on the eastern borders. This means that threats to European Integrated Border Management (EIBM) are highly unpredictable as they are reflections of opaque decision-making at political level. The continuing war in Ukraine is not alone in holding scenarios of great concern to EU border management.

The situation on the EU's eastern external land **borders will remain tense as the geopolitical conflict continues** and Belarus and Russia continue to use irregular migrants as a tool to exert pressure on the EU. As instrumentalised flows depend on unpredictable high-level political decisions, it can be challenging for EU states to detect them early and take the necessary action fast enough. However, enhanced border-control measures and amended legislation aim to make facilitated irregular migrant movements more difficult.

There are a **range of low-likelihood, high-impact scenarios specific to this region** that could have a sudden, outsized impact on EIBM. On the one hand, if the frontline in Ukraine was to move westward, renewed refugee flows could result. On the other hand, a regional expansion of the war remains possible, as does usage of CBRN means or a nuclear accident. Finally, a Trump victory in the 2024 US elections could have consequences for the war in Ukraine if, for instance, US support was withdrawn or an unfavourable settlement was forced on Ukraine. Either scenario could lead to another refugee wave. Finally, political stability in Russia and Belarus could erode over time or a successor struggle for leadership could erupt, causing domestic instability and leading to Russians/Belarusians leaving their countries.

The hybrid threat at the Finnish-Russian border will continue if Russia does not change its border policy and geopolitical aims. The scale of assisted migratory flows from/via Russia to Finland and/or their potential redirection towards other EU MSs/SACs are only of limited predictability. **Instrumentalised migration may intensify at any moment, including between BCPs**, if the Kremlin so decides. All Finnish BCPs will likely remain closed as long as the threat persists and no alternative legal solutions are available.

Instrumentalised migration might include directing provocative actions at EU border guards and damaging physical installations on the EU's external borders and using advanced measures such as GPS signal interference that may affect border surveillance activities (while increasingly also posing challenges to civil aviation). Cooperation between the Russian authorities and organised criminal groups in relation to instrumentalised migration enables OCGs to increase their capital for other criminal activities which endanger the EU's eastern external borders and internal security.

Belarus is still regarded as a departure country towards the EU for third-country nationals transiting Russia. International flight connections to Russia from high-risk countries are of particular concern, mainly due to well-organised OCGs actively involved in migrant smuggling supported by favourable visa and border policies in Russia and Belarus. The migration route via Russia-Belarus towards the EU might be used more frequently due to the temporary unavailability of previously well-established migration routes via Ukraine.

Although it is difficult to accurately assess their scale due to the complex political situation in this region, seasonal increases may occur. Social media and the support of the Belarusian authorities will remain key factors in facilitated irregular migration via Belarus. Facilitated migratory flows on the EU-Belarusian border are likely to continue as long as they serve the political aims of Belarus.

Further south, Moldova will likely continue to be the victim of Russian hybrid campaigns, including energy blackmail and manipulations of political and public opinion. The parliamentary elections in Moldova scheduled for October 2024 are a probable target of cyberattacks and disinformation campaigns. In relation to this, there are

several low-likelihood, high-impact scenarios involving Moldova in which the EU's external borders could be impacted.

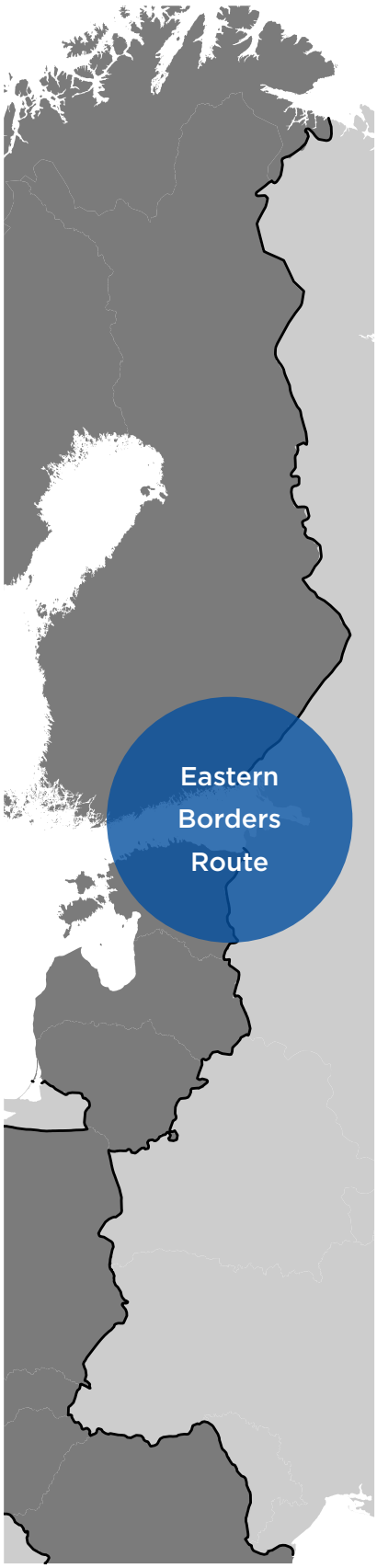
Irregular land border-crossings on the borders with Ukraine will continue due to the ongoing war. Martial law restricting freedom of movement of mainly men in Ukraine will likely continue to be applied and followed with new rounds of conscription. Further legislative changes tightening conscription parameters cannot be ruled out either. IBCs will likely continue to be made mainly by military-aged Ukrainian men due to fear of conscription. Increased border surveillance remains important 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 its land borders (except with EU) will likely remain closed and heavily guarded.

Migratory pressure via Ukraine of third-country nationals has decreased significantly 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 routes via Ukraine towards the EU will likely remain unavailable.

The **risk of weapons smuggling from Ukraine will likely remain low**. Currently it is largely restricted to foreigners carrying parts of weapons and ammunition from Ukraine as souvenirs. However, the risk may increase once the war is over, when it is possible that post-conflict firearms could become widely available, including to organised crime groups. The degree to which this happens strongly depends on the duration and eventual resolution of the war.

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 on the EU-Belarusian border is 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 the 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 Western Balkan region. Host-country pressure on Afghan and Syrian migrant populations, the risk of regional escalation of the conflict in Gaza, and enduring conflicts and economic downturns in neighbouring regions will likely be the main drivers of migration on 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 developments in key source and transit areas further east**.

As regards the **Eastern Mediterranean route**, it is likely that Afghans and Syrians will continue to constitute the largest groups of irregular migrants on this route. They face multiple pressures both at home and in third countries that host displaced populations.

Pakistan and Iran each host upwards of three 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, while continuing to ban them from settling in 19 of its 31 provinces. The antipathy towards hosted Afghans seems likely to endure amid ongoing internal pressures in Iran (where a hard-line conservative legislature faces an economic downturn and renewed western sanctions amid the conflict with Israel and a rising insurgency) and in Pakistan (where enduring security concerns and a coalition government have limited scope for reform). This can act as a push factor for Afghan migrants, who may move westwards, particularly during periods of clement weather when it is easier to cross the Ararat mountains.

In Syria, economic hardships will continue to aggravate the complex socio-political, administrative and security environment, threatening localised destabilisation in various parts of the country. This will feed already active push factors for migration. These factors can affect the

local Syrian population as well as individuals returned from host countries in the region.

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. 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 hosted refugees, limiting access to essential services and basic goods. Such hardships also feed anti-migrant sentiment, adding to an already deteriorating environment for hosted migrants, and raise prospects of forced returns. In this context and due to the Lebanese authorities' decision to no longer accept non-Lebanese returns, Cyprus experienced a rise in arrivals by sea in early 2024. **EU support to Lebanon 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 direct attacks in April 2024. While the direct attacks showed general restraint on both sides, tensions remain along with concerns that they may turn into proxy skirmishes across the region, even beyond the existing spheres. 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 are exacerbated by the conflict. Instances of nationality swapping can occur as migrants from more peaceful countries 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, coupled with a growing push by Pakistan and Iran to remove Afghans, are key factors which could increase arrivals in the Eastern Mediterranean. Increasing arrivals offer people linked to terrorism the opportunity to mix into 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 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 and facilitators are likely to keep searching for alternative routes or travel options. This re-routing, on top of the competition between smuggling organisations in the region, may lead to aggression between or among smugglers and migrants and, where necessary to successfully operate, towards border guards.

Limited return options and the misuse of open reception facilities have led to migrant build-ups in various parts of the Western Balkans, especially where reinforced border controls prevent onward movement. These build-ups sustain elevated pressure on certain borders as migrants engage in multiple crossing attempts. They have also raised security concerns, most worryingly detections of firearms at irregular migrant settlements, which have been observed since mid-2022.

The Western Balkan region's northern borders with EU MSs will remain key pressure points. While reinforced controls on the Serbian-Hungarian border have effectively curbed movements towards Hungary since October 2023, deflections towards Bosnia and Herzegovina–Croatia or other exit areas such as Serbia-Croatia may be seen more regularly once migrants / smugglers find alternative routings.

Actions at key exit points can also affect travel / cause deflections in the southern parts of the route across the region. For example, as migrants try to avoid northern Serbia they may reroute to North Macedonia – Kosovo[1] or 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 remain visa-free in the region (e.g., Turkish, Chinese and Russian) could nonetheless increasingly misuse this right in the future, driven by developments in their countries or in the wider geopolitical context.

With enhanced border-control activities throughout the Western Balkans and the Eastern Mediterranean, 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.

[1] 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.

Besides these constantly adapting facilitated irregular migration flows, weapons smuggling will also challenge border management in the region. While the Western Balkans are known as a significant source of post-conflict weapons, the whole region will be increasingly a transit area towards central and eastern Europe especially for weapons smuggled from Türkiye, the main source country of blank-firing weapons which can be easily converted for live fire.

Overall, the **reinforcement of border-control activities across the wider region remains necessary**, as they are the best option to ultimately reduce the overall attractiveness of transiting the area through irregular means. Reinforced border controls are the best way to pre-empt any wild-card scenarios, such as sudden unexpected mass flows, which additionally offer high-risk individuals options to exploit the migratory flow to enter the EU.

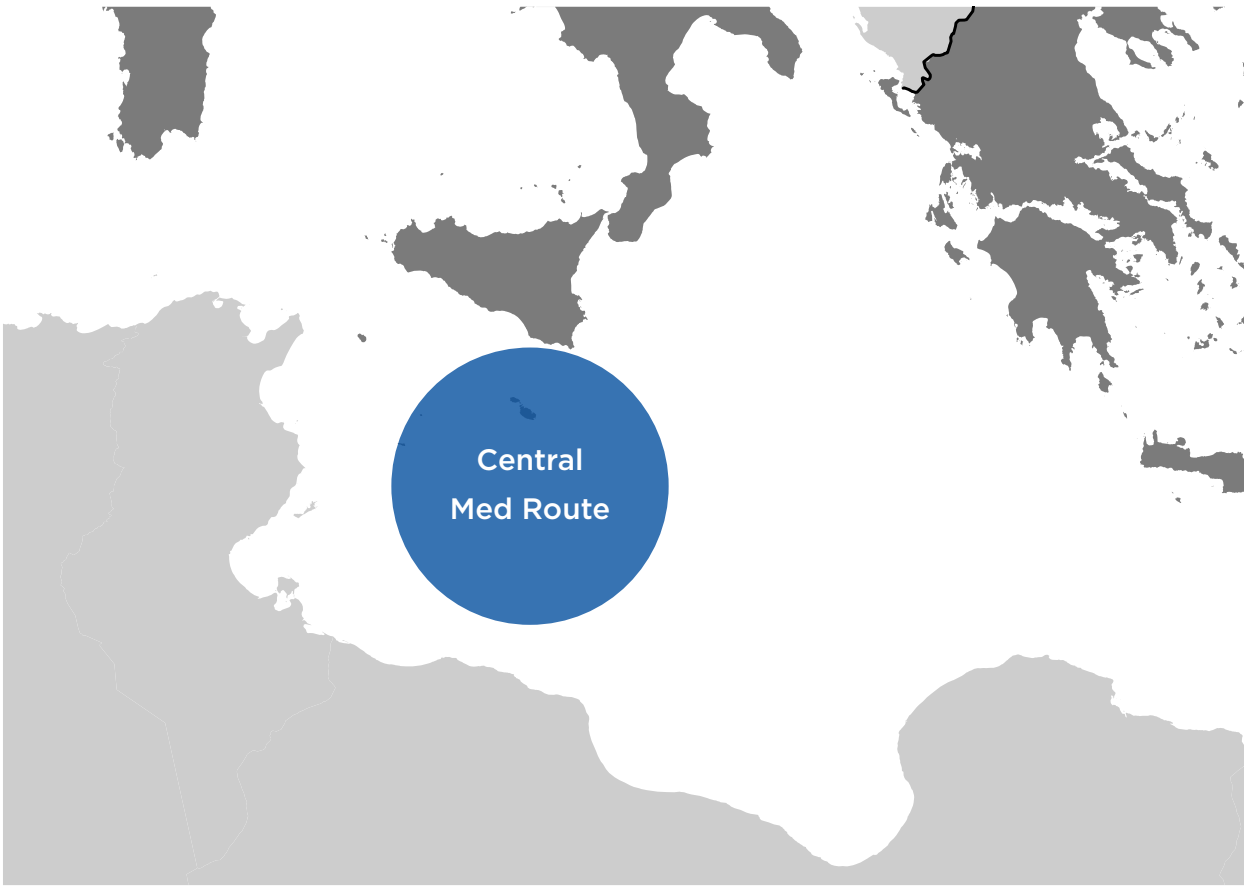
6. Southern borders

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. Vigilance is crucial to prevent undetected entries and to ensure the thorough screening of 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 from North Africa, joined by transiting migrants from sub-Saharan Africa as well as migrants mainly from South Asia that are able to use air routes to the region. The Central Mediterranean will also continue to see migrant vessels that have departed 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. This will be due to migrants from sub-Saharan Africa finding that traditional routes northwards via Niger have been revived, and also because certain nationalities will continue to fly to airports in North Africa. Bangladeshis, Pakistanis and Syrians are likely to continue to be prominent here but could well be joined by new nationalities. That said, figures in the Central Mediterranean will possibly fall short of the 2023 peak owing to determined prevention efforts by key North African transit countries. That does not mean, however, that smuggling networks will not adapt their *modi operandi*.

It is likely that **Niger will regain its key role as a transit country** towards the Central Mediterranean 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 announced a partnership with Russia. 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 heading for Europe. Economic



hardship may push more Nigerien nationals to engage in migrant-smuggling activities. In terms of push factors, the security and socioeconomic situation in sub-Saharan countries may further increase migratory movements to Niger and northwards, increasing migrant stocks across 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 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 are likely to 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. It has deepened ties in North Africa and expanded 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, including deploying mercenaries, spreading disinformation, interfering in elections, supporting coups, and supplying arms etc. to gain influence on the continent.

The outcomes of Russia's interventions in Africa are likely to have far-reaching implications for democratic governance norms and security on the continent. Russian engagement in Africa may in itself constitute a push factor, for instance if the support it deploys to regional potentates is unable to effectively counter the expanding presence of jihadist extremist groups. These groups may consolidate their grip on territory, and start focusing on more long-term objectives, like projecting power further afield. Importantly, as Russia builds influence on the continent it may be able to create and possibly direct migratory flows, the effects of which could potentially be felt for 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 expanding terrorist threat emanating from the Sahel means that **undetected entries of people linked to terrorism at the external borders will remain of grave concern for the internal security of the Union**.

7. South-western borders

In the Western Mediterranean, North African partners' prevention activities and criminal prosecutions of people smugglers mean the migratory pressure is anticipated to remain moderate and stable. However, adverse developments in the Sahel will probably mean the Western African route will see further peaks in migrant arrivals.

The fight against irregular migration by third countries in the **Western Mediterranean** will remain crucial for this route. Despite this, people-smuggling groups operating from North African shores have adapted efficiently, raising their profile 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 detected on the Western Mediterranean route. North African migrants will account for a significant portion on this route with smaller numbers of other nationalities. Although sub-Saharan migrants are present in the African countries bordering 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 borders, thereby endangering their 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

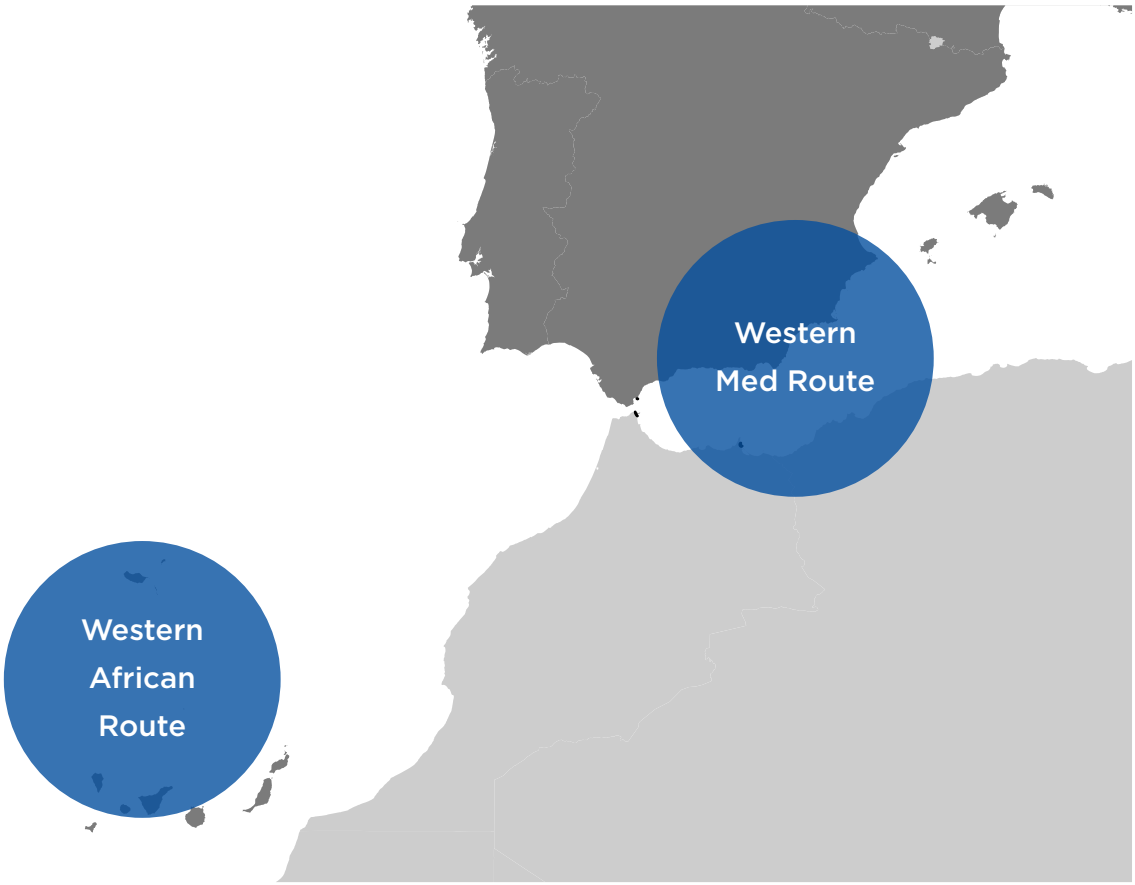
without being detected. When smuggling networks face increased challenges from the local authorities, they refer would-be migrants to people smugglers operating on other corridors, even in other countries. Migrants from the Middle East use Algerian smuggling networks to reach Europe by sea, first flying to Algeria via Libya and then overland with assistance from smugglers.

In recent years, sub-Saharan migrants have started using the Western African route instead of the Western Mediterranean route, travelling to the west African coast on 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. These routes are interconnected and influenced by geopolitical factors, economic conditions and regional dynamics. In line with this, **changes to one route can affect the other**.

The main transit countries in the region have recently 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, upholding at all times the respect for human rights. Any changes in the factors influencing departure countries' measures, such as push factors in terms of migration and regional cooperation, could affect migratory pressure on this route.

People smugglers operating in departure countries on the Western Mediterranean route will likely continue to employ complex *modi operandi* to ensure that migrant boats reach Europe without detection, for which they charge higher fees. This might allow high-risk individuals to reach the EU undetected, evade apprehension, and potentially engage in illicit activities or terrorism.

In the Western Mediterranean region, cross-border crime, particularly the trade in illegal drugs, will continue to pose a significant challenge. European shores are often targeted by organised groups smuggling hashish in speedboats. These groups demonstrate high logistical capabilities, operating numerous high-speed vessels for drug transport, as well as additional boats for refuelling and providing supplies. To evade interception, these high-speed vessels often spend extended periods in international waters. The smugglers maintain sufficient fuel reserves and vehicles to support their operations. Despite extensive efforts to address drug smuggling through numerous operations, the immense profits from the trade, as well as the growing sophistication of criminal



groups' smuggling techniques, suggest that the threat will continue.

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 adapt to the authorities' preventive measures, continuously testing their border management capacities. The length and duration of the journey on the Western African route, the perilous conditions in the open ocean, and the lack of experienced skippers dramatically increase the risk of fatalities on this route.

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 law-enforcement authorities.

Challenging socioeconomic conditions in the West African region, aggravated by environmental changes, keep pushing many people to leave the region. Increasing migratory movements, especially from the Sahel, towards the West African coast, together with the relatively low fees charged by the people smugglers on this route, could further increase the number on the Western African route. This route will therefore most likely continue to be one of the main gateways to the European Union, **with migratory pressure on this route expected to rise and fall in line with seasonal patterns**.

The violence in the Sahel, in tandem with the socioeconomic situation, increases displacement and enables criminal and terrorist groups to exploit people for financial gain and recruitment. 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 also offers an opportunity for criminal elements or individuals with connections to terrorist groups to mix with migratory flows to the EU.

People-smuggling networks now have accomplices on the Canary Islands who support irregular migrants after disembarkation and help them reach mainland Europe. Before the sea crossings, people smugglers provide irregular migrants with the contact details of these accomplices. The fact that smuggling networks have the initiative and resources to establish an inter-continental business model indicates that the fight against them will continue for the long term.

As regards drug smuggling, large cocaine seizures in littoral Western African nations in 2023 show that the **region is becoming an important hub for cocaine arriving by sea from Latin America**. This development may grow over the next year. Cocaine trafficking via the Western African route represents a lucrative source of income for criminal networks that may also be involved in people smuggling.

8. Outlook

The polycrisis has arrived in full force

Looking to Europe's immediate future, even an optimist would have to acknowledge that the continent is in a neighbourhood plunged into war, crisis and growing geopolitical competition. In the coming year, there is ample potential for further instability in Europe's direct proximity, not just in the Middle East, but also in the Western Balkans, the Caucasus, West Asia and the Sahel. Consequently, European integrated border management must adapt to an age of 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 capacities throughout the system. As stable, reliable partners in direct proximity to the EU are fewer in number, and with threat multipliers such as climate change already exacerbating push factors, the European Border and Coast Guard must show resilience and strength to succeed 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, 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 impelled Syrians to sail to EU territory from Lebanon, This migrant flow is of great concern for the near-term future, as, should this flow grow in scale, the threat of terrorists blending in with the migrants/refugees 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, now in its third year, continues to hold a number of scenarios that may have serious implications for EU border management. Among 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 feasible that the stability of the Russian or Belarusian regimes will 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 as well as indirectly (via for instance the Western Balkans).

In Africa, political instability and the proliferation of jihadist groups in the Sahel is increasingly concerning. These factors add to 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 related to the El Niño climate pattern. Among the factors driving displacements in the Sahel, above all others is the conflict in Sudan. As of 28 April 2024 the UNHCR 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 travel long distances or to pay for facilitation towards Europe, yet as time goes on some of them will 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 backsliding on such policies.

Hybrid threats and terrorism remain top of the agenda

Apart from 'naturally' occurring migrant flows, instrumentalised migration by state actors hostile to the European Union and its Member States will likely continue, if not intensify, in the coming year. The events at Finnish-Russian border-crossing points towards the end of last year attest to Russia's interest in stress-testing particular sections of its extensive western borders with its EU and Schengen neighbours. The next Russian-orchestrated hybrid threat could be on 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 to 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 been perpetrated by lone actors, most of them operating without any formal links to a terrorist organisation, the Crocus City Hall attack near Moscow in March demonstrates that groups such as ISIS-K can carry out larger-scale attacks. 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 preventing the movement of high-risk individuals and mitigating the associated risks for EU internal security.

Effective international cooperation

Despite the concerns outlined above, which might suggest that migration pressure is on an upward trajectory in the year ahead, it is not certain that the number of IBCs will rise, as a flurry of new agreements with major transit countries have recently been signed. These agreements are already increasing prevention activities and will to some degree endow these partners with capacities and capabilities to prevent migrants leaving their borders in the longer term. That said, people smugglers show

great skill at adapting their *modi operandi*. Furthermore, as a result of more effective prevention activities, some of these countries may find themselves hosting sizable populations of migrants who wish to travel to Europe. This will give them leverage over the EU and its Member States. Taken together, these points would suggest that efforts to strengthen the second tier of the four-tier access control model on its 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 new *Pact on Migration and Asylum* will not enter into force within the next year, it would be in line with well-established patterns to see people smugglers pointing to the Pact to boost their business activities. Hence, more numerous migrant departures may be expected in the run up to the Pact's entry into force.

Cross-border crime preying on the vulnerable

In the year ahead, cross-border crime will continue to exploit vulnerable and displaced people for migrant smuggling and labour and sexual exploitation. The sustained demand for black market and illegal products will encourage criminals to smuggle various commodities across borders, including drugs. There is an increased risk that smugglers 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 the *modi operandi*.

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

Looking beyond the year ahead, the Agency's forthcoming *Strategic Risk Analysis* has a 10-year time horizon which develops scenarios for European Border Management until 2034. It studies megatrends, such as increasing demographic imbalances, accelerating technological change and hyperconnectivity, and widening inequalities, to name a few. It gives best-case, baseline and worst-case scenarios, which are complemented by a hybrid threat scenario.

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