

FRONTX

**Annual Risk Analysis
2025/2026**





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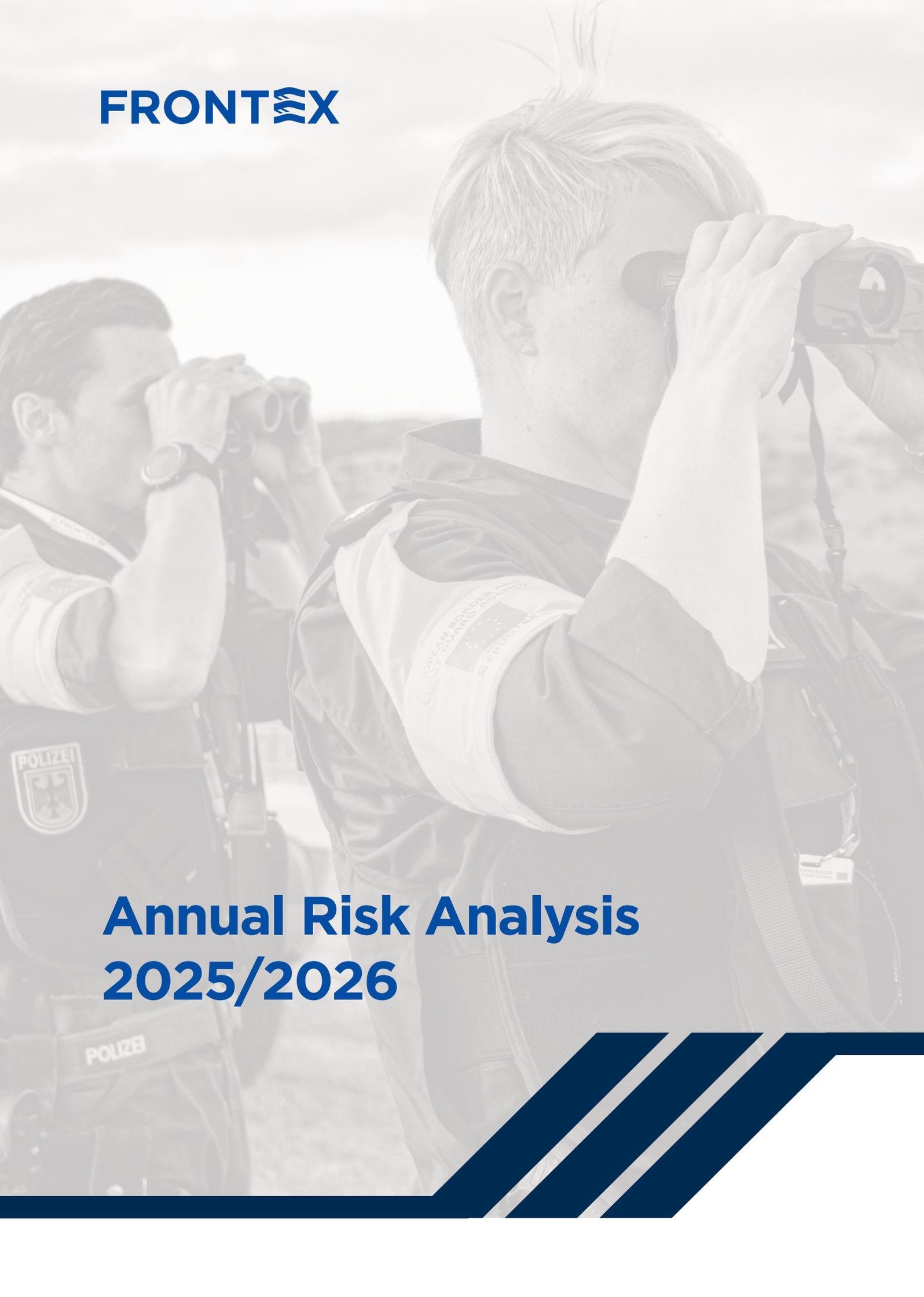
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Abbreviations

AES	Alliance of Sahel States
ARA	Annual Risk Analysis
AUSSOM	African Union Support and Stabilization Mission in Somalia
BCP	border-crossing point
EBCG	European Border and Coast Guard
ECOWAS	Economic Community of West African States
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
GNU	Government of National Unity
IDP	internally displaced person
IBC	illegal border-crossing
ISIS	Islamic State of Iraq and Syria
MS	EU Member State
OCG	organised crime group
PMC	private military company
UNSCR	United Nations Security Council Resolution
US	United States of America

1. FOREWORD

At a time of profound geopolitical uncertainty and evolving security challenges, the European Union's external borders demand vigilance, adaptability, and above all, foresight. Frontex, as the European Border and Coast Guard Agency, stands at the forefront of this effort: providing Member States with accurate, reliable and timely information to safeguard Europe's borders and uphold its values.

This Annual Risk Analysis presents a comprehensive, evidence-based view of the pressures and threats at the EU's external frontiers. Our role is not simply to react to emerging risks but to anticipate them, ensuring that Member States have the data, intelligence, and strategic insight required to prepare effectively.

Frontex has evolved into a trusted partner for Member States, grounded in professionalism, accountability and a firm commitment to fundamental rights. Our work underpins Europe's capacity to respond to migration flows, hybrid threats and cross-border crime with resilience and unity.

The analysis prepared by our experts shows that the external environment remains highly volatile, marked by instrumentalisation of migration, hybrid threats, and adaptable criminal networks. It highlights the persistent challenges along the eastern borders due to Russia's war of aggression, the risks posed by instability in the Middle East and Africa, and the growing complexity of migratory movements by air, land and sea. Against this backdrop, the importance of timely intelligence, robust contingency planning, and coordinated border management has never been greater.



In a world of shifting risks, trustworthy information is Europe's strongest protection. By delivering a clear and balanced picture of the threats and trends at Europe's external borders, Frontex empowers Member States to take informed, strategic action, often with the support of our Agency. Strengthening Europe's security starts with knowledge. And through reliable data, continuous alertness, and shared responsibility, we are ready to meet the challenges ahead.

Hans Leijtens
Executive Director

2. EXECUTIVE SUMMARY

Root causes of persistent migratory pressure on the EU's external borders

European integrated border management (EIBM) continues to be challenged by geopolitical instability, economic and climate pressures in third countries, and organised crime.

The situation on the EU's eastern borders remains volatile due to Russia's ongoing war of aggression on Ukraine. The flow of migrants across the Eastern borders is influenced by strategic decisions made by Moscow and Minsk to instrumentalise migration to put pressure on EU border management. The US-led ceasefire negotiations may also affect migration on this border.

In the Middle East, while the structural shifts that took place in 2024 suggest a degree of stabilisation, the region remains a source of long-term security concerns. Continued Israeli military operations against Hamas and Hezbollah, coupled with the fragmented political and military situations in Syria and Lebanon, present ongoing challenges. These factors could drive further displacement and increase migratory pressures on Europe in the medium to long term.

In Africa, the Sahel region also poses significant challenges. Armed conflicts and worsening economic conditions are accelerating displacement across borders. The recent formation of the Alliance of Sahel States (AES) has weakened regional security cooperation, allowing organised smuggling networks to flourish. Of particular concern is Russia's growing influence in the region and its military foothold in Eastern Libya. This presence raises fears that migration flows across the Mediterranean could be instrumentalised to put further pressure on the EU.

Irregular migration via air borders also remains a key concern, with fraudulent documentation and visa regime exploitation enabling irregular entries. Smaller airports with weaker border controls can be exploited, while changes to US migration policy could increase pressure on European air borders by directing migratory flows of Venezuelan, Colombian and Cuban nationals as well as non-Latin American migrants towards the EU.

Intensifying hybrid threats to weaken European unity

In addition to these geopolitical and migration challenges, the possibility of Russia and Belarus intensifying hybrid threats against the EU is a serious concern for EIBM. These threats have already manifested themselves in asymmetric

methods that Russia has used to serve its strategic interests in Ukraine and to try to re-establish influence over Eastern Europe. Both Russia and Belarus continue to use migration as a geopolitical weapon, leveraging it to destabilise key migratory routes.

While our focus is on the Eastern Borders, the increasing Russian influence in the Sahel together with its military presence in Eastern Libya raises strategic concerns.

Sabotage operations, such as those targeting critical infrastructure in the Baltic Sea, cyberattacks, disinformation campaigns and infiltration by Russian military and civilian intelligence operatives further underscore the multifaceted nature of these threats and require enhanced preparedness, strengthened border control and solid contingency planning by the European Border and Coast Guard.

Infiltration by high-risk individuals

The movement of high-risk individuals poses another challenge to EIBM. As migration from conflict-affected regions increases, so does the risk of infiltration by individuals who pose a threat to the internal security of the EU, such as criminals, terrorists, saboteurs and intelligence operatives. These individuals exploit migration routes to enter European territories, further complicating border security operations. Systematic checks using biometric data and other available technologies are essential to mitigate this risk and ensure the detection of such high-risk individuals.

Cross-border crime as a persistent and adaptable threat

Cross-border crime remains a persistent threat to the EU's external borders. Organised criminal networks engage in a range of illicit activities, including vehicle theft, drug trafficking, firearms smuggling and document fraud. The EU's proximity to current and former conflict zones exposes it to the trafficking of firearms, increasing the risk of these weapons being used for criminal or terrorist activities in Europe. These criminal enterprises demonstrate remarkable adaptability, continuously developing new methods to evade countermeasures and maintain the profitability of their operations.

Addressing these challenges requires ongoing vigilance, the deployment of advanced technologies and enhanced information exchange between the competent authorities of Member States and third countries to disrupt criminal networks and secure Europe's external borders.

3. INTRODUCTION

The Frontex Annual Risk Analysis (ARA) 2025/2026 is a publicly available strategic risk analysis report that identifies the key risks to the external borders of the EU, based on a regional approach. Risks for European integrated border management by air, land and sea are intertwined and multifaceted to the point of constituting a strategic and operational *continuum* between the internal and external security of our Union. EIBM intelligence is a pre-requisite for effective and cost-efficient operations that are based on the best available evidence, enabling sound policy and decision-making by operational actors.

The ARA is exclusively focused on the main risks *on entry* to the EU, across thematic areas, within a time horizon of one year from the time of publication (Q3 2025 – Q3 2026). Even though the Channel route *on exit* is outside the scope of this report, it has several implications for secondary movements and therefore for the EU's cooperation with third countries. The **Channel route**

is the **final leg of secondary movements towards the United Kingdom**, mainly involving migrants who arrive in the EU on the Eastern and Central Mediterranean routes (Syrians, Afghans, Iranians, Eritreans, Sudanese) and the Western Balkan route (Turkish nationals). It is also used by migrants who arrive in the EU legally with visas for work or study (Vietnamese nationals) or from visa-free countries (Albania).

The report offers conclusions on the main risks to inform policy and strategic decision-making. The analysis on irregular migration, cross-border crime, terrorism and hybrid threats provides a comprehensive overview of future threats and challenges that could jeopardise the security and smooth functioning of the EU's external borders. In a change from previous editions of this report, the content is now enriched with analysis of air borders, returns and vulnerabilities.

4. EASTERN BORDERS

Nowhere else on the EU's external borders is geopolitics a stronger determinant of migration as on the Eastern borders. Threats to border security here are highly unpredictable, as they result from opaque political decision-making in Russia and Belarus. The ongoing war in Ukraine and the US-Russia ceasefire negotiations make the situation very precarious and cause great concern for EU border management.

The situation on the EU's eastern external land borders will remain tense as long as Russian aggression against Ukraine continues and irregular migrants are used to exert pressure on the EU. Amid these security concerns and the risk of instrumentalised migration from both Belarus and Russia, enhanced border-control measures and amended legislation have been adopted to challenge facilitated irregular migrant movements.

As instrumentalised flows depend on high-level political decisions, their scale, extent and specific dynamics are difficult to foresee. However, as the situation in Ukraine evolves and as the EU takes greater responsibility in supporting Ukraine, Russia may be incentivised to extend hybrid operations against Member States to influence internal politics and foreign policy decisions.

Migratory flows from third-country nationals to the EU via **Ukraine** were brought to a halt by the war and the closure of the air and land borders with Belarus and Russia. These established migration routes are unlikely to reopen in the near future. However, the war has triggered

new migration dynamics, notably among Ukrainian men of military age fleeing conscription.

On the broader geopolitical front, **US-Russia negotiations** towards a ceasefire in Ukraine may affect migration dynamics. While the US is likely to push for a ceasefire so it can refocus its foreign policy on countering China, a formal peace agreement would take months to negotiate, given the complexities of the situation. If the war is going well for Russia, it may seek to prolong negotiations to gain more territory. Ukraine's internal political stability remains fragile, potentially resulting in continued irregular migration flows, particularly of Ukrainian men fleeing conscription once martial law is lifted. Major migratory flows in the case of faster and deeper Russian advances in Ukraine are highly likely, especially in the case of another withdrawal of US support for Ukraine.

On the **EU-Russian border**, since the closure of Finnish border-crossing points there has been no significant new migration or displacement. Yet, the potential for future

Russian actions to exert pressure on its border with EU Member States, including the Baltic States, remains unpredictable. A shift in Russia's approach regarding the green borders could lead to new migration flows.

The **EU-Belarusian border** is a persistent challenge, particularly due to the state's manipulation of migration flows. While border surveillance has increased and tougher legislative measures have been implemented in all three EU Member States bordering Belarus, these efforts have only partially mitigated the problem. Following a temporary reduction in flows during the latter half of 2024 due to a series of tougher border surveillance measures, seasonality and the political situation in Belarus (including Belarusian security forces' focus on strengthening internal security before the presidential election), there has been a notable uptick in attempted illegal border-crossings (IBCs) in early 2025, particularly at the Polish border. This suggests that migration pressure is likely to increase again during the more favourable summer months.

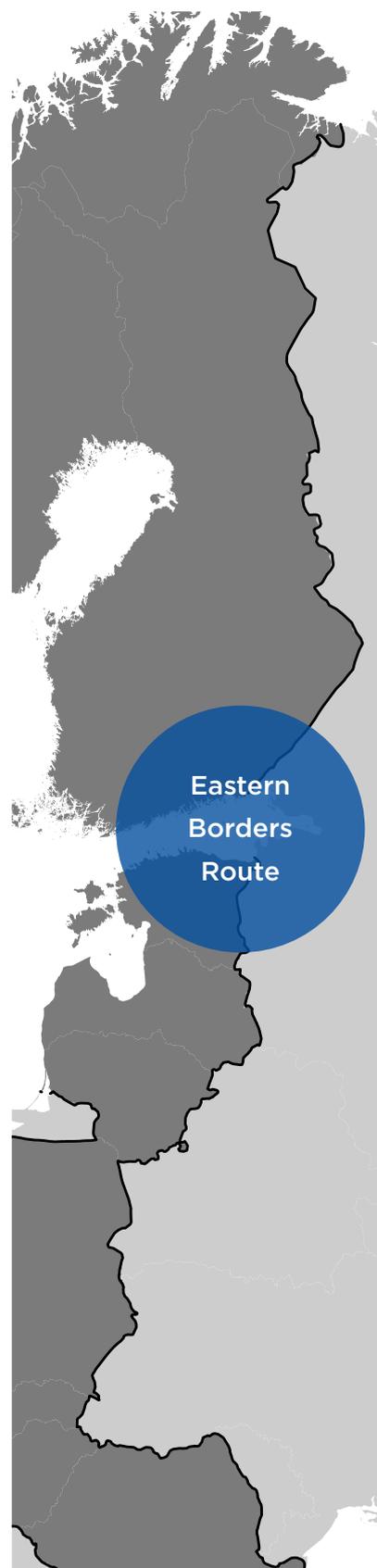
Given the volatility of the situation, **instrumentalised migration flows** from Belarus via Russia remain a risk. The exact scale and nature of these flows are difficult to predict, but the potential for further increases is highly likely, potentially in coordination with Russian actions. This calls for heightened vigilance and robust border-control measures, including sustained investments in border-control capacities and staffing.

Russia's war of aggression in Ukraine has created various other cross-border crime risks, including the potential exposure to trafficking of vulnerable categories of persons, such as unaccompanied children.

A ceasefire in the Russia-Ukraine conflict could affect cross-border crime, particularly on the **EU-Ukrainian border**. The supply of contraband, especially weapons, is expected to rise as soldiers and mercenaries are demobilised. Additionally, economic hardship in the region could drive smuggling activities, including excise goods and stolen vehicles.

Smugglers will continue to adapt to enhanced border enforcement by using innovative methods such as drones, GPS-tracked balloons and rafts at river borders. The **Belarusian-Polish border** remains a hotspot for smuggling activities, with contraband hidden in legitimate shipments or carried via covert methods.

To counter these threats, Member States will need to prioritise **enhanced inspections, advanced detection technologies**, and **close monitoring of cargo routes**. Regular **risk assessments**, strong **cooperation** among EU Member States and adaptable legal frameworks will be essential to manage these evolving security challenges.



5. SOUTH-EASTERN BORDERS

Migration pressure on the Eastern Mediterranean and Western Balkan routes is decreasing in accordance with Frontex's predictions. However, key uncertainties remain. While efforts to control migration flows from the Middle East, South Asia and North Africa have had some success, change and instability in areas like Lebanon, Syria and Gaza can still influence migration patterns. Economic pressures affecting local and hosted populations in Afghanistan, Iran and Pakistan are also expected to drive further migration.

In 2024, the Middle East saw structural shifts that led to a generally positive atmosphere by the end of the year. Enhanced border controls and restricted access to facilitation funding have slowed uncontrolled migration flows from high-risk zones like Lebanon, Syria and Gaza. While key mitigation and security measures by regional powers such as Türkiye and Israel are likely to limit any massive spillovers of irregular migration towards the EU in the short term, amid the dynamic situation in the Middle East longer-term uncertainties persist, which could provoke renewed instability and migration pressures.

Lebanon remains fragile, with localised clashes potentially escalating into a persistent security challenge, particularly south of the Litani River. A range of uncertainties, including delays in troop withdrawals, the non-implementation of

UNSCR 1701 under the November 2024 ceasefire, and regional proxy conflicts, heightens the risk of further instability. This could lead to new migratory pressures as populations seek refuge or safer ground.

Gaza has seen a brief improvement in security following the January 2025 ceasefire, allowing for the return of internally displaced persons (IDPs), humanitarian assistance and prisoner exchanges. However, Israel's continued airstrikes and land operations against Hamas targets, along with the nascent governance transition and competing international proposals for Gaza's future, leave the situation volatile. Several factors which have prevented uncontrolled migratory outflows (e.g., enhanced control of the demarcation lines of the Gaza strip with Israel



and Egypt) could conceivably remain in place despite continuing uncertainties.

Meanwhile, an expansion of military operations in the West Bank in late February 2025 raises additional uncertainties about local population displacements and perhaps wider regional impacts.

Following the fall of the Assad regime in December 2024, Syria has faced a complex transition process. The new government is navigating a fractured political and military landscape, attempting to implement reforms that integrate multiple minorities and military factions. While there is cautious optimism, the risk of inter-factional violence, particularly involving minority groups like the Alawites, Kurds and Druze, remains significant. Additionally, the presence of foreign military forces and competing regional interests can complicate efforts to stabilise the country. These dynamics, if unresolved, could drive further migration from Syria, especially if tensions between minority groups escalate.

Across the broader region, ongoing turmoil may become a key factor in **jihadi recruitment** and extremists' political/military ambitions. Militants, including those linked to groups like Hamas, Hezbollah and ISIS, may seek to infiltrate migration flows to escape intensified regional security measures. The weakening of Kurdish forces in northeastern Syria may increase the opportunity for ISIS to regroup and further destabilise the region.

Türkiye continues to be a pivotal actor in managing migration flows, especially from Syria, Iran and Afghanistan. Its enhanced border-control mechanisms and cooperative relationships with Syrian rebel factions have thus far curtailed irregular migration. However, Türkiye's role in the region, coupled with its proximity to key instability zones, means that it will continue to play a critical role in shaping migration trends, both as a transit point and potential host country for displaced populations.

Since March 2024, **Iran** has expelled over one million Afghans, although roughly 50% have returned. The **tightening of US sanctions** under the Trump administration, coupled with potential military actions, could destabilise Iran's already fragile economy and exacerbate migration pressures. In **Pakistan**, the looming deadline for deporting millions of Afghan refugees further contributes to regional instability. These developments could significantly increase the flow of migrants, particularly into the EU, as displacement accelerates in response to these enforcement measures.

In **Afghanistan**, the ongoing economic stagnation under Taliban rule remains a core driver of migration. The lack of job opportunities for the country's growing youth population, combined with persistent political instability, creates long-term pressures on neighbouring countries, including Iran and Pakistan, which are already managing significant refugee populations. This stagnation could lead to increased outward migration if the economic situation does not improve.

Migration pressures in the medium to long term are therefore expected to persist. Traditional drivers such as economic hardship, seasonal migration, and ethnic or political uncertainties will likely continue to push migration flows even if security in the Middle East improves. Key regions of concern include **Türkiye**, which will remain a critical transit hub for migration into the EU, particularly via the Eastern Aegean and Western Balkans. The **Libya-Crete corridor** could also become a key route, reflecting the growing influence of North Africa on irregular migration dynamics in the Eastern Mediterranean. The corridor could easily be targeted by other nationalities as well. Consolidation of yet another sub-route, directly impacting secondary movements, risks further hampering the proper functioning of the Schengen area and increasing tensions between Member States.

Despite showing a decreasing trend in the last couple of years, the **Western Balkans** will remain a key transit area for migrants heading towards Western Europe. Syrian (30%), Afghan (14%), Turkish (9%), Moroccan (7%) and Bangladeshi (4%) were the top nationalities detected on the secondary movement corridors deriving from the Western Balkan route¹ in 2024.

While EU countries have taken steps to align their visa policies with stricter controls, organised criminal groups (OCGs) remain adept at exploiting loopholes. Migrants from the Middle East (such as Syrians) and South / Central Asia (such as Afghans, Pakistanis, Bangladeshis), including those with fraudulent documents, will continue to test EU border security. Incidents of violence and kidnappings associated with migrant smuggling in the Balkans signal a re-emergence of dangerous routes controlled by criminal networks looking to adapt to the police operations which have significantly disrupted their activities since 2023-2024. The region is also seeing a rise in cross-border crime, particularly **drug smuggling**. Afghanistan remains a major source of heroin, while the production of cannabis in the Balkans is expected to increase due to the proximity to European markets. The **smuggling of firearms** is also a growing concern, with weapons—both small arms and more **sophisticated items like 3D-printed parts**—being smuggled through the region, exacerbating security risks.

¹ Based on data from Slovenia, Austria and Hungary.

Increasingly, firearms are being used by both migrant smugglers and migrants themselves, presenting new security threats at borders. The **EU's external borders**—especially those shared with **Türkiye** and the **Balkans**—will remain high-risk areas for smuggling activities. Efforts

to disrupt smuggling routes through increased police operations and enhanced surveillance technologies are likely to continue, but criminal groups can be expected to find ways to get around these measures.

6. SOUTHERN BORDERS

The challenges caused by migration on the Central Mediterranean route and in the surrounding regions are complex and multifaceted. Political instability, conflict and environmental factors in source and transit countries drive significant migratory pressure, which is projected to remain high.

Libya, as the primary country of departure, continues to be a critical focus. Well-established smuggling networks, bolstered by Libya's fragmented governance and the involvement of multiple criminal groups, indicate that the situation is unlikely to improve in the near term.

The EU and Italy are strengthening agreements with North African states to curb irregular migration, particularly with Libya and Tunisia. However, **the long-term effectiveness of such agreements is uncertain**, as past efforts have shown limited results in significantly reducing flows. So, despite these measures, migration pressure is unlikely to abate, with continued departures expected year-round, especially as seasonal conditions do not significantly affect migration on this route.

Eastern Libya remains a pivotal transit hub for migrants from beyond the region, with **Benghazi's Benina airport playing a crucial role**. Migrants from **Bangladesh, Syria and Pakistan**—who make up the majority of arrivals on the **Libyan-Italian corridor**—are likely to persist in using this route due to its established networks, high success rates and the relatively short journey. However, potential shifts in Syria's political dynamics could influence these trends. Stabilisation in Syria might reduce migration from that country, nevertheless, economic hardship, emerging regional violence as well as other enduring local and geopolitical uncertainties and limited opportunities could still drive migration flows.

New routes may emerge through West Africa, Türkiye and the Balkans, depending on security and border controls. **The halt of charter flights by certain air carriers to Benghazi could lead to alternative migration pathways**, with Libyan smuggling networks possibly targeting sub-Saharan migrants, shifting migration trends. Monitoring these developments is crucial to anticipating changes.

The **increasing Russian military presence in Eastern Libya raises strategic concerns**. Russian-backed forces

and private military companies (PMCs) operating in Libya, particularly through the Maaten Al Sarra airbase, have **the potential to instrumentalise migration flows as a tool of hybrid warfare against the EU**. Russia may also **expand its operations in Mali, Burkina Faso, Niger and Sudan**, potentially exacerbating migration pressures and facilitating the infiltration of individuals that represent a security threat to the EU. Should the situation deteriorate, it is likely that Eastern Libya would see a rise in migratory flows, potentially via new or expanded land routes across north Africa.

Libya's Government of National Unity (GNU) is implementing measures to curb irregular migration, primarily through increased security patrols and crackdowns on smuggling networks. While these efforts may temporarily reduce departures, Libya's coastal areas remain under the control of militias that profit from migration. If the GNU successfully suppresses these militias, departures may decline. However, smugglers are adaptive and could shift their operations to less monitored areas. Without addressing broader governance issues and the economic drivers of migration, the effectiveness of these measures will be limited, and these migration flows are likely to continue.

Sudan's civil war, which erupted in April 2023, remains **one of the world's most severe humanitarian crises**, with millions displaced. Despite this, **Sudanese migration to the EU remains relatively low**. However, the ongoing political instability, compounded by a dire economic situation marked by high inflation and food insecurity, will likely continue to drive displacement. Even if peace efforts succeed, migration pressures will persist, given the systemic challenges facing the region.

In **sub-Saharan Africa, political instability, conflict and environmental crises are exacerbating migration pressures**. The Sahel region is experiencing escalating violence from militant Islamist groups, with fatalities

increasing significantly. Countries like **Burkina Faso**, **Mali** and **Niger** are severely affected, and the instability is spilling over into coastal West Africa. Climate change is worsening displacement, particularly in **Sudan** and **Somalia**, where severe droughts and floods are disrupting livelihoods. This environmental and economic stress will continue to drive internal and cross-border migration.

For the EU, these trends will represent sustained or increasing migratory pressure, necessitating a long-term strategic response. **Strengthening border management, enhancing humanitarian responses and establishing robust partnerships** with African countries will be essential to mitigate these pressures.

In **Somalia**, the **ongoing instability fuelled by political fragmentation, weak governance and the persistent threat of Al-Shabab** remains a significant concern. The African Union's mission in Somalia, **AUSSOM**, **faces coordination and funding challenges, with geopolitical tensions**, particularly between Ethiopia and Egypt, complicating the mission's effectiveness. This instability is likely to continue contributing to high displacement figures. There were nearly four million internally displaced persons in Somalia at the end of 2024. This **regional instability will likely contribute to increased migration flows toward Europe**.



7. SOUTH-WESTERN BORDERS

The Western Mediterranean and Western African migration routes remain key entry points to the EU, driven by economic hardship, conflict and organised crime. Migratory flows vary seasonally. The number of arrivals has remained stable since 2020 on the Western Mediterranean route, while the increasing trend on the Western African route continued in 2024. Smuggling networks on these routes have adapted to enforcement by the authorities.

The Western Mediterranean migration route continues to carry significant irregular migration flows into the EU, primarily through maritime and land routes. This route involves both sea arrivals in mainland Spain and the Balearic Islands, as well as land-based entries to Spain's North African exclaves of Ceuta and Melilla. Migrants typically originate from Morocco and Algeria. Over the past few years, significant seasonal variations have been observed, with migration peaks typically occurring between July and December, and a marked decline in the early months of the year.

The peaks and troughs can be attributed to the more favourable weather and sea conditions during the summer and autumn months. The summer is also a time

when many migrants make their journey in search of employment opportunities that will become available after the summer. The combination of high unemployment, low wages and limited economic prospects drives young people to pursue more favourable opportunities within the EU. Furthermore, the desire for family reunification and an improved standard of living serve as a constant motivation, encouraging people to migrate in search of a better life.

Migration trends in this region have fluctuated over time, with a significant surge in 2018, followed by a decline until 2022. However, in 2023, there was a slight increase in migrant arrivals, which remained at the same level in 2024. A change in the composition of migrants was observed



in 2024 due to a significant decrease in departures from Morocco and an increase in departures from Algeria. A shift of departures towards eastern locations in the region resulted in a surge of arrivals in the Balearic Islands.

The Western Mediterranean route is mainly chosen by residents of North African coastal areas, where migrant smugglers offer their services. The rigorous surveillance of these areas by the authorities in these countries, both on land and at sea, makes it challenging for individuals of other nationalities to remain in these areas and connect with smugglers without being caught. Smuggling groups have developed tactics to evade detection and ensure that migrant vessels reach the Spanish mainland undetected. This can allow individuals with potentially malicious intentions to merge with irregular migrants, enter the EU undetected and potentially engage in criminal activities. In 2025, it is anticipated that migrant arrival figures will remain relatively stable, mirroring the trends observed in 2024.

A **persistent and substantial issue in the region** is the role of organised crime, particularly in relation to **drug trafficking**. The Western Mediterranean remains a critical corridor for the smuggling of drugs, **notably hashish and cannabis, from North Africa to Spain**. Smuggling operations typically involve the use of speedboats to transport drugs from Morocco to Spain, often circumventing interception efforts by operating in international waters. Despite heightened law enforcement efforts, this illicit trade persists due to the financial incentives involved and the advanced techniques employed by smuggling groups.

The Western African route runs from West Africa to the Canary Islands, a transit point to mainland Spain. The route is used by economic migrants and those fleeing violence in their countries of origin. It comprises three primary corridors: from **Morocco, Mauritania and The Gambia/Senegal**. **The presence of organised smuggling groups** capable of rapidly responding to preventive measures **poses a significant threat**. The numbers of arrivals follow a seasonal pattern, with fewer people arriving from March to July. The numbers then start to increase in August, reaching a peak in October and November. High numbers of arrivals continue until January or February, influenced by favourable weather and sea conditions.

In recent years, **migrants from sub-Saharan Africa have chosen the Western African route instead of the Western Mediterranean route**. Smuggling fees on the Western African route are lower and smuggling networks have been established along land routes to facilitate migrant movements from their countries of origin. Both routes to Spain are interconnected and influenced by geopolitical factors, economic conditions and regional

dynamics. Changing migratory patterns have had a direct influence on the nationalities of migrants arriving on the Canary Islands. Driven by an increasing stock of Malian migrants and the expansion of smuggling networks from Senegal and The Gambia into Mali since the end of 2023, **Mauritania has emerged as a key departure point for migrants heading to the Canary Islands**. The **increased number of Pakistani migrants detected along the route in 2024 indicated the expansion of smuggling networks to include Asian nationals**, in addition to migrants from the Sahel.

The **deteriorating situation in the Sahel and the expansion of terrorist groups** from Burkina Faso, Mali and Niger to coastal West African states have significant implications for migration flows in the region. The humanitarian and security crisis in Mali generates a refugee flow into Mauritania and contributes to migratory pressure on the Western African route. The worsening situation in the region is unlikely to be resolved anytime soon, given the complex interplay of factors. The decision by Mali, Burkina Faso and Niger to form a new Alliance of Sahel States (AES) and to withdraw from ECOWAS will likely have an impact on security cooperation and counterterrorism.

From a geopolitical perspective, the Sahel is experiencing a complex and evolving situation, driven by a multitude of foreign influences. At the forefront of this development is Russia, which is increasingly expanding its presence in the region, particularly in Mali, Burkina Faso and Niger. Through PMCs Russia is seeking to extract resources, gain political influence and demonstrate great power status. Russia could also leverage its presence to fuel instrumentalised migration to Europe and raise the costs for the EU to secure cooperation with African countries on migration issues. This is a particular concern, given Russia's history of exploiting migration to further its geopolitical interests.

Meanwhile, United States foreign policy is undergoing a significant shift, with the new administration cutting foreign aid and emphasising hard power over soft. This change is likely to impact migration to the EU, as the halt of US aid to African countries could create power vacuums that extremist and organised criminal groups could exploit. The consequences of this policy shift are already being felt, with many African countries that relied on US assistance for health security, disease surveillance and vaccination programmes now facing challenges.

As a result of these developments, migration dynamics in the region are shifting significantly. Tensions between neighbouring countries have led to closed borders and strained relations. The revocation of Niger's anti-smuggling law has raised fears of increased flows of migrants northwards across the Sahara. The regional security vacuum has attracted new military actors,

including Russia and China, each with their own interests and agendas. Although China's military presence remains minimal, it has expanded via agreements to secure Chinese-run oil infrastructure in the region.

It is likely that the Sahel region will remain a critical focal point for international attention, with the EU and other global actors seeking to promote stability in the region and mitigate the risks that trigger forced displacements and mass migration.

Migratory pressure on the Canary Islands is expected to remain high in 2025, influenced by an interplay of factors such as environmental pressures, socio-economic grievances, conflict, rapid population growth and weak governance. Geopolitical shifts in the Sahel are creating conditions that are likely to continue driving increased migration flows, such as the flow from Mali to Mauritania and then to the Canary Islands.

8. AIR BORDERS

Air routes to the EU have witnessed irregular migrants exploiting visa-free regimes and transit hubs. Fraudulent documents, visa abuse and nationality swapping remain key risks. Smuggling groups adapt to increased controls by using smaller airports. The new US administration's migration policies may redirect flows to the EU. Visa policy misalignment in the Western Balkans and hybrid threats further challenge border management.

The resumption of regular air traffic after the easing of pandemic restrictions has been accompanied by an increase in irregular migration via air routes. There has been an uptick in migrants exploiting visa-free regimes in neighbouring countries and using those countries as transit points before crossing the EU's external land or sea borders. Departures from third countries towards EU airports (directly or via transit) continue to offer a safer and often more discreet alternative, compared to hazardous land and sea journeys.

In the coming year, irregular migration through the EU's external air borders is expected to remain stable. However, increased flight capacities from key countries of origin, along with expanded air routes via Türkiye and other Middle Eastern countries and Western Balkan hubs, could intensify migratory pressure. The scale of this impact will depend on geopolitical developments, socio-economic conditions in countries of origin, and the availability of flight connections. African and South Asian migration to the EU by air is also anticipated to rise due to shifting demographic and economic trends.

Fraudulent documentation remains a primary enabler of irregular entry at EU airports. Criminal networks continuously refine methods to circumvent border controls, providing sophisticated forged documents. Fraudulently obtained visas, impostors—individuals using another person's identity—and nationality swapping, where migrants claim to be from conflict-affected regions to facilitate asylum claims, are persistent tactics.

Airports in the Arabian Peninsula serve as primary transit points for migrants from the Middle East, Central and

South Asia en route to the EU. These hubs facilitate irregular movements through document fraud and the exploitation of visa regimes. Smuggling networks are likely to adjust their strategies by identifying alternative transit airports with perceived weaknesses in border controls. Smaller regional airports, which may lack expertise in detecting document fraud or handling certain migrant profiles, could become targeted locations for illegal entries.

The misuse of Airport Transit Visa (ATV) waivers remains a challenge, as some migrants refuse onward flights and attempt to seek asylum or exit transit zones illegally. While the introduction of ATVs for high-risk nationalities has mitigated some abuses, coordinated implementation across EU Member States is critical. Otherwise, displacement effects could occur, with migrants shifting to airports in countries that have not suspended ATV waivers. High-connectivity airports remain particularly vulnerable due to their extensive transit networks.

The liberalisation of national work permit systems—intended to address labour shortages—may inadvertently create new avenues for irregular migration. Smuggling networks could exploit these legal pathways by providing fraudulent job offers or work permits to facilitate entry. Additionally, cases of human trafficking linked to fraudulent employment schemes are expected to persist. Strengthened vetting mechanisms are essential to prevent abuse.

Tighter immigration controls and increased deportations under the new US administration could redirect migration flows towards the EU. Migrant nationalities that have

traditionally attempted to enter the US across its southern border, including Venezuelan, Colombian and Cuban nationals, may shift their focus to Europe. Some of these nationalities, including Venezuelan and Colombian nationals, already benefit from visa-free access to certain EU Member States.

Non-Latin American migrants who previously transited through Central and South America to reach the US may also explore routes to the EU. Large émigré communities within the EU could incentivise secondary movements. Monitoring these trends will be essential to anticipate potential increases in irregular migration at European airports.

Migration to airports near the EU, particularly in the Western Balkans, poses a persistent challenge due to visa policies not being aligned with those of the EU. Some

nationalities that cannot travel to the EU without a visa may travel to one of these airports and then attempt to illegally cross the EU's external border. Even where Western Balkan countries have aligned their visa policies with the EU, the initiation of new air routes, especially to Middle Eastern hub airports, can lead to an increase in potential irregular migrants arriving in these countries before heading for the EU. Migrants who ordinarily may have sought to enter the US to claim asylum or overstay, may instead seek to travel via Western Balkan countries, most probably after transiting via large hub airports in the Middle East or Türkiye.

The instrumentalisation of migration is also a concern with regard to air travel. Coordinated efforts between border authorities, intelligence agencies and air carriers are essential to detect and prevent it.

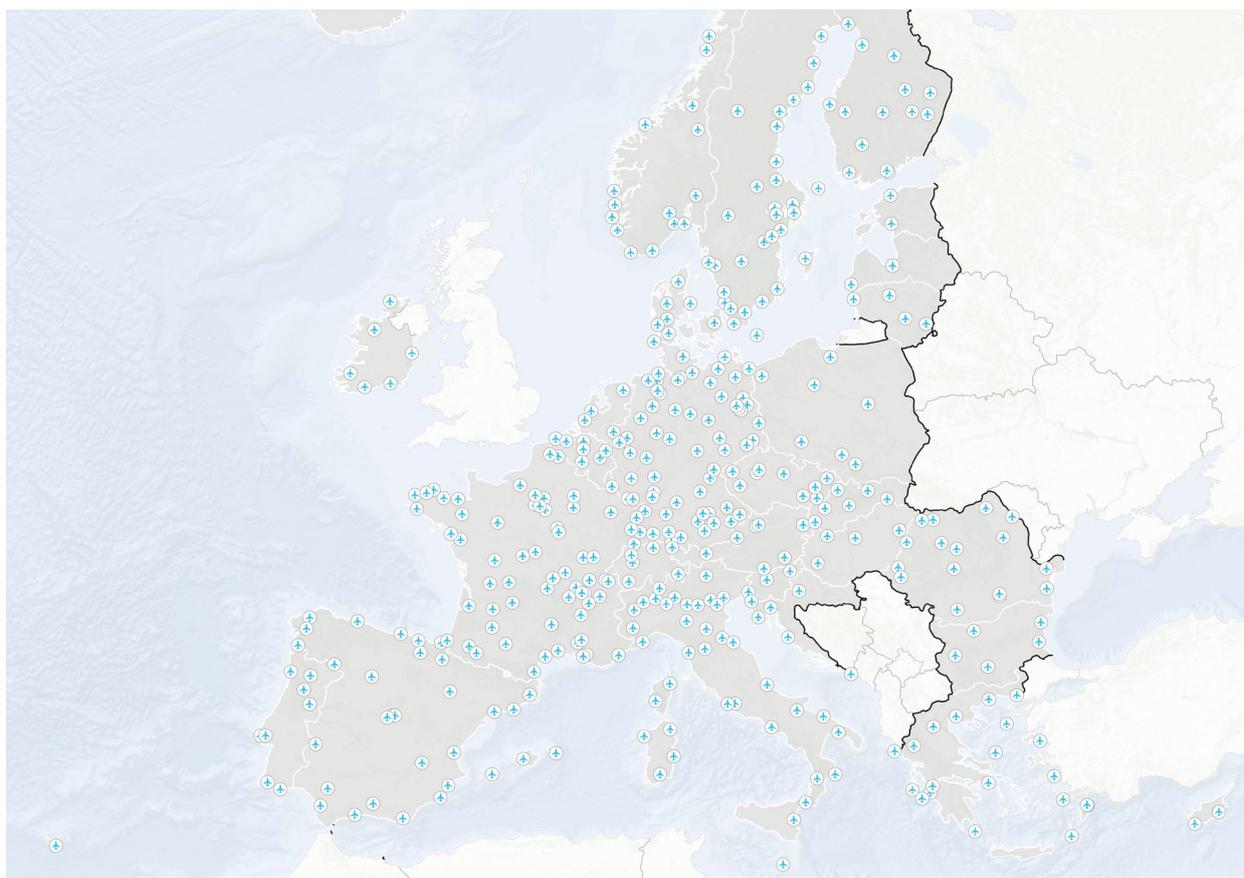


Figure 1. Airports across EU Member States and Schengen Associated Countries

9. OUTLOOK

Migration dynamics and key considerations

Geopolitical developments will be a primary factor influencing migration patterns. Tensions along the EU's eastern borders, particularly concerning the ongoing conflict in Ukraine and potential US-Russia ceasefire negotiations, are expected to sustain migration pressure on this border. Instrumentalised migration will likely continue as a destabilising tactic.

The Western Balkans will remain a critical transit corridor for irregular migration toward Western Europe in spite of the declining number of IBCs. This route will continue to be exploited by highly organised and increasingly violent criminal groups, requiring enhanced cross-border cooperation and intelligence-sharing efforts.

In the southern and southwestern regions, migration pressures will persist, driven by political unrest and economic hardship. The Western Mediterranean and Western African routes will remain key entry points, with organised crime groups adapting rapidly to evolving enforcement measures. The Central Mediterranean route is anticipated to sustain high migration volumes, with political instability in key transit regions, particularly Libya, remaining a focal point. Increased engagement with North African partners will be essential to mitigate and manage migration dynamics effectively.

Recent developments in the Middle East present additional strategic concerns. Renewed military confrontations involving Israel, Hamas and Hezbollah, combined with the region's fragile political environment, are projected to increase migration along the Eastern Mediterranean route.

Air travel will also remain a significant entry avenue, with migrants exploiting visa-free regimes and transit hubs. The misuse of Airport Transit Visa (ATV) waivers and the liberalisation of national work permit systems may inadvertently open new channels for irregular migration. Addressing these vulnerabilities will require coordinated policy measures and sustained monitoring of emerging routes.

The future of Russian aggression

Hybrid threats originating from Russia's proxies and Belarus will remain a consistent and evolving challenge. These threats may escalate in response to geopolitical shifts, including a potential ceasefire agreement or changes in EU-Ukraine relations. Threat tactics are expected to include direct provocations against EU

border personnel, sabotage of border infrastructure, cyberattacks and disinformation campaigns aimed at undermining EU cohesion and public confidence.

A growing area of concern is the potential infiltration into irregular migrant flows of mercenaries or war veterans with advanced combat capabilities. These individuals pose an elevated security risk, particularly if integrated into organised crime networks. Hybrid threats are not expected to diminish following a potential ceasefire; rather, they may intensify as resources are redeployed from conventional military operations toward asymmetric and covert activities.

Strategic readiness requires a multifaceted response, including strengthening technical surveillance systems, enhancing intelligence cooperation and maintaining operational flexibility. Vigilance and cross-border coordination will be essential to mitigate the risks posed by hybrid threats and to safeguard the integrity of the EU's external borders.

Cross-border crime: Strategic implications for border management

Cross-border criminality will continue to present a substantial threat to EU security. Violent organised crime groups operating along key migration corridors, particularly in the Western Balkans, are expected to maintain and expand their activities. The persistent demand for excise goods, stolen vehicles, illicit drugs and firearms—amplified by proximity to current and former conflict zones—exacerbates the risk environment.

Document fraud remains a critical enabler of cross-border criminality, impacting air, land and maritime borders alike. Strategic responses must prioritise the deployment of advanced detection technologies, the strengthening of document verification processes, and deeper collaboration with international partners to disrupt criminal networks effectively.

Trafficking in human beings continues to be a concern at the EU's external borders and is likely to persist. Economic inequalities and other social/political factors in non-EU countries of origin lead many victims to fall prey to traffickers' deceptive promises of better jobs and living conditions in the EU. The threat of child trafficking requires particular attention, especially for unaccompanied minors crossing the EU's external borders, mainly via maritime corridors towards the EU.

Systematic changes in passenger flow management

Despite ongoing geopolitical and economic uncertainties, passenger volume is expected to increase slightly in the coming year, driven by strong travel demand and the aviation sector's post-pandemic recovery. Air travel remains the dominant mode of entry to the EU, although land border crossings may rise due to potential policy changes in Member States bordering Russia and Belarus.

The EBCG community faces significant transformations with the implementation of the Entry/Exit System (EES) and the upcoming European Travel Information and Authorisation System (ETIAS). While these systems aim to enhance Schengen area security through pre-screening and biometric verification, they may also lead to longer processing times and increased refusals of entry. This is expected to particularly affect visa-free Latin American countries. Developments in US migration policy may further influence migration patterns towards the EU.

Enhanced EU border controls and increased cooperation with third countries are reshaping migration flows. As legal travel channels become more regulated under EES and ETIAS, there is a heightened risk that even more migrants will use fraudulent documents or clandestine methods to enter the Schengen area.

Frontex support for return activities

While the decline in the number of return decisions issued and the increase in persons effectively returned were positive developments in 2024, this trend is not homogeneous across the EU and third countries. A relatively higher number of effective returns was recorded for countries in the Balkans and the Caucasus in comparison to Africa. In recent years, Frontex's return assistance to Member States has grown steadily, assisting both voluntary and forced returns, as well as providing other types of support, e.g. return counselling, identification activities and assistance through the EU Reintegration Programme.

Traditional obstacles to returns, such as secondary movements and absconding, remain a concern, along with lack of cooperation from third countries and lengthy return procedures, which result in a lower number of returns and a return backlog.

The return process is likely to be further shaped by legislative changes, such as the new return border procedure under the Pact on Migration and Asylum, as well as a new return regulation. The outcomes of these legislative and procedural changes remain subject to overcoming procedural and organisational issues, such as lack of resources/infrastructure, IT system incompatibilities in information exchange at national

and European level, e.g. between screening, asylum and return processes. The level of third-country cooperation on readmission will remain the key factor determining the number of returns from the EU.

To boost efficiency, key steps include continuous targeted support for Member States based on their needs and plans, expanding partnerships with third countries and securing funding for return activities. Tailored strategies for return should account for regional differences and capacity building, and successful and sustainable reintegration.

Forward planning

To address the evolving challenges posed by migration, hybrid threats and cross-border crime, the EU must adopt a forward-looking and adaptable approach. Only an approach that is grounded on predictive EIBM intelligence and a sound and flexible operational response can help the EU and its Member States navigate and mitigate a risk environment which remains replete with existential challenges for EIBM and threats to the security of our Union. A predictive approach must be built upon access to large data sets, the full roll-out and use of EUROSUR functionalities, and the ability to process and share intelligence with a variety of actors across professional constituencies.

Prioritising the enhancement of border resilience is essential—this involves substantial investments in advanced surveillance technology, intelligence-sharing mechanisms and capacity-building. Further reinforcement of border security as part of the EU Action Plan on Ukraine concerning the threat of firearms diversion and smuggling attempts should be continued by Frontex in synergy with its internal plan of action and handbook addendum, as well as strategic and operational recommendations. Strengthening multilateral cooperation, particularly with North African and Western Balkan partners, will be crucial to mitigate irregular migration drivers and dismantle organised criminal networks.

The Entry/Exit System (EES) and the European Travel Information and Authorisation System (ETIAS) will have a huge transformative impact. The EU must ensure operational preparedness. This includes comprehensive training for border personnel, expanding processing infrastructure, and refining passenger flow management practices to minimise delays and improve efficiency. Maintaining strategic flexibility is also vital, allowing the EU to swiftly adapt policies in response to shifting geopolitics and emerging security risks.

The EU must reinforce its return strategy by balancing the growing role of Frontex with robust national capabilities. This dual approach will ensure that return operations

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remain both effective and aligned with legal frameworks and humanitarian principles. By aligning operational readiness with strategic foresight, the EU will be better positioned to protect its borders while preserving the values of security, human rights and regional stability.

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

Looking beyond the year ahead, Frontex's *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.

FRONTEX



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