FRONTEX

STRATEGIC RISK ANALYSIS REPORT

2024

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STRATEGIC RISK ANALYSIS REPORT

Foreword by
the Executive Director

As our world undergoes rapid and profound transformations, characterised by geopolitical shifts, technological advancements, and societal pressures, the security challenges facing our borders become increasingly complex and interconnected. The Strategic Risk Analysis 2024 offers a critical examination and provides essential insights into the emerging threats and opportunities that will shape the future of European integrated border management.

A defining characteristic of the 21st century is the interconnectedness of global challenges. The report underscores the intricate interplay of factors such as climate change, economic disparities, and geopolitical instability, which are driving unprecedented levels of migration and various types of cross-border crime. These challenges demand a robust and adaptive response from European policymakers, practitioners and academics as well as operational agencies and authorities.

The analysis presented in this report highlights the imperative for a strategic and holistic approach to border management. The need to move beyond reactive measures and towards a proactive, intelligence-led framework is essential, and is also driving Frontex development. By anticipating emerging threats and developing robust prevention strategies, Frontex can enhance its ability to support national authorities and protect borders while upholding shared European values.

Faced with global challenges, we need to further enhance international cooperation and information sharing. By strengthening partnerships with countries of origin, transit, and destination, we can address the root causes of migration and dismantle criminal networks.

The increasing role of technology in both facilitating and countering threats is a key focus of the analysis. While advancements in technology offer significant opportunities to enhance border security, they also present new challenges. It is imperative that we invest in research and development to stay ahead of evolving threats and harness the potential of technology to improve our operational capabilities.

I can only echo the authors, who emphasise the need for a human-centred approach to border management. Respect for human rights, dignity, and international law must be at the core of all border related activities. By balancing security with compassion, we can build trust and cooperation with all affected and strengthen the overall resilience of our societies in the next decade.

This report serves as a vital foundation for developing effective strategies to address the challenges of the coming decade and ensuring the security of the European Union and the Schengen Area. By understanding the complex interplay of factors shaping the border security landscape, we can build a more resilient, secure, and inclusive Europe. As we navigate the uncharted waters of the future, I hope this analysis will provide essential guidance for policymakers, practitioners, and researchers alike.

HANS LEIJTENS
EXECUTIVE DIRECTOR
FRONTEX

Executive summary

For European IBM to function properly an element of foresight is required. The Strategic Risk Analysis 2024 aims to provide this foresight. It addresses the key question:

WHAT WILL BE THE KEY THREATS AND CHALLENGES FOR EUROPEAN IBM OVER THE NEXT 10 YEARS AND THEIR POSSIBLE IMPACT?

The report analyses the components of EIBM and the interplay of the relevant megatrends across the four-tier access control model. It reaches the following conclusions:

EU border and migration management will face multifaceted challenges in the next decade. European IBM should prepare for a turbulent decade ahead and be ready for ominous scenarios. Migration phenomena are characterised by multicausality, which renders the formulation of policy responses particularly difficult. Migration decisions are influenced by, among other things, individual aspirations and capabilities, megatrend effects, adaptation and coping strategies at societal level, and legal/illegal opportunities for cross-border mobility. Migrants may predictably decide to stay or move, but they may also act in unexpected ways.[1] That shows, at least partly, why the management of migration is, and will remain, particularly challenging for all countries of origin, transit and destination.

The Pact on Migration and Asylum jointly with the amendments to the Schengen Borders Code will enhance the response of border control and migration management authorities to the instrumentalisation of migrant flows, health crises and secondary movements.

The formulation and implementation of a grand policy on migration alongside effective cross-policy domain coordination and cooperation with internal and external stakeholders will emerge as a key requirement.

MIGRATORY PRESSURES WILL MOST LIKELY INCREASE DURING THE NEXT DECADE, REQUIRING SUBSTANTIAL IMPROVEMENTS IN GENERAL PREPAREDNESS AS WELL AS IN CRISIS PREPAREDNESS. EUROPEAN IBM WILL NEED TO BE MADE MORE RESILIENT, MINIMISING OPERATIONAL AND LEGAL VULNERABILITIES.

EU border and migration management will benefit from improvements across all IBM components which will allow for capability development and more effective operational responses (e.g., infrastructure, training, surveillance, information exchange, intelligence reporting and cooperation with third countries). The strengthening of EU border controls at BCPs and surveillance of border sections, the development of analytical, early warning and foresight capabilities and crisis responses that address cases of migration instrumentalisation[2] can help avoid some of the worst effects of disproportionate migratory flows and destabilisation of Member States by hostile third countries and non-state actors. In addition, EU border and migration management will become more effective, humane and future-proof by adopting a broader outlook on border- and migration-related phenomena around the world. Strategic foresight and futures thinking could make

valuable contributions by providing broader, future-oriented and actionable perspectives.

Technological advancements are likely to play an important role in reshaping future migrant-smuggling activities. Typically, over 90% of irregular migrants who reach the EU use smuggling services for parts or all of their journey. With the proliferation of encrypted communication channels, blockchain-based transactions and sophisticated surveillance systems, smugglers are likely to modify their methods to enhance efficiency and more effectively evade detection.

THE ONGOING WARS AND INSTABILITY IN THE EU'S NEIGHBOURHOOD, TOGETHER WITH ANY NEW SECURITY CRISES, WILL LIKELY BE THE KEY DRIVERS OF MIGRATORY AND REFUGEE MOVEMENTS TO EUROPE.

The war in Ukraine, civil wars in Libya and Syria, the instability in Lebanon and the conflict between Iran, Iran's proxies in the region (e.g., Hezbollah, Houthis) and Israel will have a serious impact on migration and refugee movements in the future.

The top 20 source countries for irregular migration and the key migratory routes to the EU will likely remain the same in the next decade. Previous Frontex analyses have found that the composition of the top 20 nationalities has remained broadly unchanged in recent years with only year-on-year fluctuations in the ranking of the nationalities detected at the EU's external borders. Table 1 shows the African and Asian nationalities that consistently appear on this list.[3] The key migratory routes — that is, the Eastern, Central and Western Mediterranean routes and the Western African route — will likely remain the same too.

Besides hostile geopolitics and security crises, the interplay of other key drivers of national, regional and international migration — such as structural and systemic inequalities, economic crises, climate change, environmental degradation, resource scarcity and demographic changes — will significantly affect low-income countries and drive migratory flows towards richer countries.

The role of Frontex in returns will become essential. Exchange of information, data and best practices between Member States and Frontex will provide reliable situational awareness on returns, enhancing national return systems and processes and facilitating activities in the pre-return stage (e.g., through identification missions). Digitalisation and technological applications will help improve return systems and processes. Mechanisms for collecting return data, central repositories of information and online communication tools for return cases will enhance efficiency and provide more accurate statistics. The performance of national return systems will benefit from digital transformation significantly.

MEGATRENDS RELATED TO GEOPOLITICS AND SECURITY WILL EXERT A PROFOUND INFLUENCE ON REGIONAL AND INTERNATIONAL DEVELOPMENTS OVER THE NEXT DECADE. COOPERATION WITH COUNTRIES OF THE GLOBAL EAST AND SOUTH WILL BE VITAL TO EUROPEAN BORDER MANAGEMENT.

The AI revolution will have both positive and negative implications for EU border management. At the same time as enabling crime and other threats to EIBM, including cyberattacks against border infrastructure, AI applications will be used to improve the capabilities of Frontex and national authorities (e.g., AI-powered systems and tools for border checks, border surveillance and intelligence/risk assessment).

ENHANCED TECHNICAL COOPERATION WILL BE REQUIRED NOT ONLY BETWEEN FRONTEX AND THE MEMBER STATES BUT ALSO WITH THE COMPETENT AGENCIES OF THIRD COUNTRIES IN AFRICA, THE MIDDLE EAST AND SOUTH-EAST ASIA ON MIGRATION, RETURNS AND CROSS-BORDER CRIME.

A host of megatrend effects (e.g., economic hardships, technological advances, security crises) will affect international migration, crime and terrorism. Armed conflicts in the EU's neighbourhood and hybrid interference by certain third countries (e.g., instrumentalisation of migration, weapons trafficking) will affect the EU's internal and external security.

The increasing militarisation will also influence EU border management and security, especially at external border sections neighbouring conflict zones. Frontex's performance and effectiveness will also depend on the quality of international relations and level of cooperation between the EU and third countries.

Following the recent changes to the Schengen Borders Code and the Pact on Migration and Asylum, Frontex will work significantly on the Entry/Exit System (EES) and on the European Travel Information and Authorisation System (ETIAS), which will enhance the European Border Management system over the next decade.

1. Introduction

It is important to acknowledge the important role of foresight for Frontex as an Agency. Foresight looks at the root causes of phenomena and their possible implications for European IBM. As a forward-looking thought process, it benefits, among other things, from broad literature reviews and the collective intelligence of experts (esp. their sensemaking and anticipatory abilities). Foresight supports organisational mindfulness in relation to the mandated areas of Frontex and national border and coast guard authorities. By enabling a high-level understanding of the 'big picture' of possible futures, it makes a qualitative difference in strategic conversations, policy formulation, decision-making, organisational preparedness and capability development planning. Properly communicated through the ranks, strategic foresight also helps in making essential connections between policy, strategy and operational activities, supporting organisational learning and effectiveness.

METHODOLOGY

The SRA methodology guides the information collection and analytical work with the purpose of addressing the key research question: what will be the key threats and challenges for European IBM over the next 10 years and their possible impact? The common integrated risk analysis (CIRAM) model is the overarching risk analysis framework that lays the foundation for all operational and strategic risk analyses. The understanding of risk as a function of threat, vulnerability and impact, and the four-tier access control model, are inherent parts of the SRA methodology.

The majority of foresight techniques are of a qualitative nature since there are no statistical data about the future to allow for quantitative analysis. Hence, the majority of most foresight studies rely on current scientific knowledge (evidence), expert judgement (intuition), and creative synthesis of qualitative perspectives and insights. The choice of foresight methods is organisation-dependent reflecting their methodological preferences, the availability of in-house expertise, and managerial decisions.

Figure 1 *SRA design and methodology.*

So, Frontex has employed a proven qualitative design and methodology for the preparation of the SRA report consisting of literature reviews, thematic analyses, consultations with Member State experts, megatrends implications assessment and scenario-building.

LITERATURE REVIEWS AND THEMATIC ANALYSES.

The interdisciplinary (cross-domain) literature review method is a key element of the SRA process. It runs throughout the analytical process of SRA and concurrently with other techniques and expert workshops. It aims at understanding the broader context of European IBM and identifying themes and risk indicators for effective assessment and monitoring of future developments. It covers all 14 megatrends (or prioritised ones), and supports thematic analyses on migration, returns, cross-border crime, terrorism and hybrid threats. These analyses are presented in separate chapters of the report with the purpose of assessing their strategic implications for EU border management.

MEGATRENDS IMPLICATIONS ASSESSMENT.

Frontex uses the megatrends implications assessment tool[4], which was developed by the European Commission Megatrends Hub[5], to better understand the global risk environment and the future challenges it may pose for European IBM. Frontex organises special workshops with Member States' experts to jointly reflect on the implications of megatrends and possible future developments. In those workshops, experts work in small groups under the guidance of moderators and then provide their input in a plenary session. The assessment of megatrends implications is essential to improve understanding of global trends and the root causes of phenomena as well as to anticipate how they might affect the EU's external border security in the future. Megatrends[6] are hugely interlinked and constitute a complex set of equally important risks and challenges. That is why their possible impact is also assessed across the thematic areas of interest (i.e., migration, returns, cross-border crime, terrorism, hybrid threats) to assist policymaking and strategic planning in the context of the multiannual strategic policy cycle on European IBM.

01 Accelerating technological change and hyperconnectivity
02 Aggravating resource scarcity
03 Changing nature of work
04 Changing security paradigm
05 Climate change and environmental degradation
06 Continuing urbanisation
07 Diversification of education and learning
08 Widening inequalities
09 Expanding influence of East and South
10 Growing consumption
11 Increasing demographic imbalances
12 Increasing influence of new governing systems
13 Increasing significance of migration
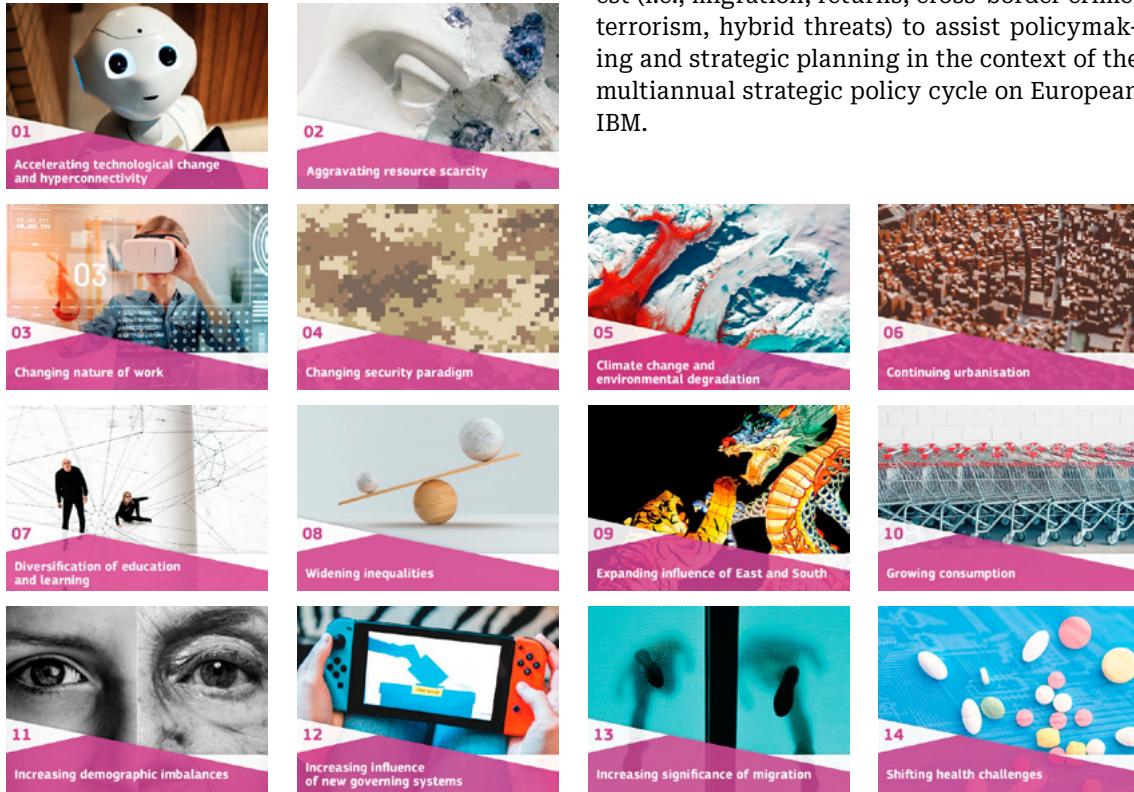14 Shifting health challenges

Figure 2   *The 14 megatrends.*

EXPERT WORKSHOPS AND CONSULTATIONS.

Any foresight report that informs policy-/decision-making and long-term planning relies on expert analysis, sensemaking and judgement. The participation of experts in the SRA process allows Frontex to tap into their collective intelligence and insights while providing significant learning opportunities for all involved. In this framework, Frontex has established a Strategic Risk Analysis Network (SRAN) and an internal Round Table on SRA ('expert groups') to provide essential input on megatrends, examine their possible impact on EU border management, develop alternative scenarios, and validate findings. Close cooperation and consultations with Frontex and Member States' experts is crucial for the successful preparation of SRA reports. Frontex will soon establish a network of external experts through an Open Call. The external expert network will comprise knowledgeable actors from various academic fields. This network will complement and support SRAN activities informing the preparation of future SRA reports.

SCENARIO DEVELOPMENT.

Scenario development is a best practice that allows organisations to capture the complexity of their environment and identify alternative futures. Those narratives (or future stories) often take the form of best-case, worst-case, baseline and in-between scenarios. Besides general scenarios, specific scenarios can be developed to meet organisational needs and requirements (e.g., scenarios that assist strategic planning and capability development).

There are various methodologies to build alternative scenarios. For SRA purposes, scenario development employed a combination of expert consultations (expert judgement), brainstorming, forecasting and 'backcasting' techniques. The latter involves working backwards from an identified future. In order to do this, three future statuses were initially envisioned within the 10-year horizon. That is, a baseline scenario

Figure 3   *Alternative future scenarios.*

(expected future or status quo), a pessimistic scenario and an optimistic scenario. Each scenario was carefully explored by the experts who tried to identify not only the possible developments that might connect the present to the future, but also considered other somewhat less ominous or promising gradations (i.e., different scenario variants). A thematic or in-between scenario was also developed to explore a particular area of interest. The goal, of course, is not to predict the future with a high degree of accuracy (that is impossible), but to 'sense' how the future might play out by outlining possible future directions, identifying future threats, opportunities and challenges, and assessing their implications for European IBM over the next 10 years. The overall approach is qualitative and exploratory, allowing for a broader reflection on future events and possibilities. While acknowledging the impossibility of accurate long-term future predictions, this approach helps in envisioning a variety of possible futures — including ominous, unexpected, and undesirable ones — and assessing their possible impact on European IBM.

Figure 4 *A simplified model of strategic foresight for policy in Frontex.*

The SRA report informs policy, strategic decision-making and planning in the context of the multiannual strategic policy cycle on European IBM. In this context, futures thinking on megatrends and thematic areas of interest to Frontex is essential to assess global risks and provide long-term foresight and alternative scenarios. Foresight allows internal and external stakeholders to engage in strategic conversations about the future. What will be the scope of threats and challenges over the next decade? What might be their impact on European IBM? How to address them? How to future-proof the organisation?

How to improve its capabilities and crisis-preparedness? How to reduce or eliminate vulnerabilities? Foresight is most useful to those organisations that not only intend to manage more effectively inside a VUCA[7] environment, but also wish to influence the course of future events so as to arrive at a desirable future (while avoiding ominous ones). It is an approach that supports organisational adaptation and effectiveness inside an everchanging and increasingly turbulent global environment.

2. Megatrends implications assessment

The megatrends implications assessment is a proven methodology for strategic foresight that helps develop a comprehensive understanding about major driving forces and their possible impact on thematic areas of interest. By adopting a cross-domain (interdisciplinary) approach, it avoids the limitations of single-domain perspectives. Usually, major changes have external causes that necessitate broader perspectives and expertise to anticipate future developments. Hence, this assessment helps EU border management explore and assess the implications of numerous causal factors, including their linkages and interdependence, inside the global risk environment. This chapter takes into account the previous SRA assessments and provides an updated overview of the most important findings for the next decade.

GEOPOLITICS AND SECURITY

GEOPOLITICS AND SECURITY WILL BE THE MOST IMPORTANT MEGATREND EXERTING A PROFOUND INFLUENCE ON REGIONAL AND INTERNATIONAL DEVELOPMENTS OVER THE NEXT DECADE.

The SRA 2020 and 2022 reports identified hostile geopolitics and security crises as the general direction of future events in a multipolar world. Subsequent developments (e.g., war in Ukraine, war in Gaza, coup d'états in African countries) and numerous analyses[8] have confirmed this assessment. Achieving a peaceful state of affairs in the world will be impossible over the next 10 years, due to the conflict between powerful actors that has entered a hot and long-lasting phase driven by their geopolitical, economic and security interests. Consequently, regional wars, proxy wars and hybrid interference will be the normal state of affairs.

ALL SIGNS INDICATE THAT HUMANITY WILL EXPERIENCE SOME OF THE WORST EFFECTS OF HUMAN CONFLICT WITHIN THE NEXT 10 YEARS.

This will be a largely deterministic process because there is no power or consensus in world politics to rise above the human condition and all forms of adversarial conflict. Rival powers will continue to fight over the issue of 'international order', as each one sees it, 'in a state of nature' (or anarchy)[9]. Order will remain a prerogative of nation-states since there is no global sovereign (or 'Leviathan') and the United Nations perform a largely symbolic role. The clashing ambitions and interests of the great powers, middle powers and many other countries will guarantee a state of disorder. Until this fundamental conflict ends, there will only be short pauses that rivals will use as opportunities to prepare for the next phases of the conflict. So, humanity will remain a hostage of its own nature, and — if the conflict escalates into an existential battle between great powers — potentially become a victim of it.

HUMAN CONFLICT WILL BE THE NUMBER ONE THREAT FOR HUMANITY AND THE PLANET.

Various scholars have offered explanations about the nature of conflict, identifying its deeper causes in human nature. Conflict is deeply entrenched in human nature — permeating even the most inconspicuous elements of thinking and action — and will continue to influence world affairs indefinitely. Conflict, war and hybrid action against the 'other' will be seen as necessary for survival, protection of national interests, and domination. A wide scope of state and corporate interests — ranging from geopolitics, geoeconomics, competition over finite energy resources and critical raw materials to semiconductors and artificial intelligence — will be major elements of conflict. The rivals' narratives will be carefully crafted to serve their strategic ends.

EVERYTHING MIGHT BE POTENTIALLY WEAPONISED AGAINST THOSE WHO ARE PERCEIVED AS HARMING A GROUP'S INTERESTS AND WAY OF LIFE.
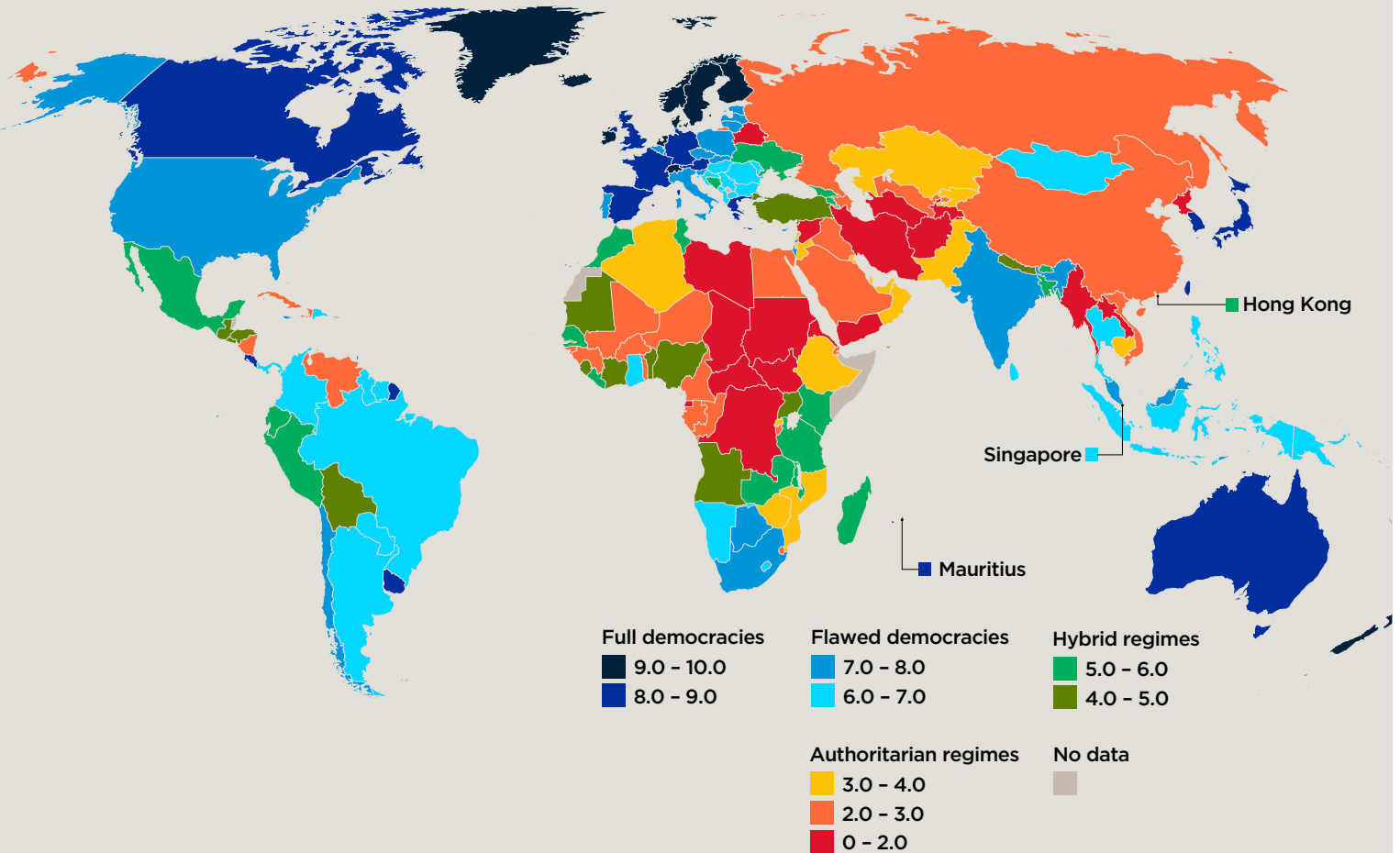
The rivals will systematically weaponise all elements of connectivity to inflict harm and destabilise their enemies.[10] Irregular migration, for example, will also be instrumentalised against the EU for political purposes. The espoused values and interests of the rivals will characterise their strategic narratives aimed at domestic and external audiences. Hybrid interference and the spread of mis/disinformation, with the help of AI, will be constant.

'COALITIONAL INSTINCTS'[11] AND SHARPLY DICHOTOMOUS THINKING WILL CHARACTERISE INTERNATIONAL RELATIONS, CREATING AN INSURMOUNTABLE CHASM BETWEEN THE RIVAL POWERS.

Strategic communications will play a key role in the geopolitical conflict.[12] Western actors will blame the authoritarianism and revisionist plans of their opponents as prime causes of the conflict. Non-Western actors, in turn, will argue that Western actions and rhetoric about rules-based order, human rights and democracy are hypocritical, self-serving, elitist and neo-colonial. Sharply dichotomous views of the world will interfere with the geopolitical pragmatism and diplomacy required in a period of intense conflict. It will be an extremely dangerous period because the rivals possess formidable economic and military power and will not back down. Portraying each other as an 'arch enemy' will make negotiated settlements impossible. Value-laden positions (e.g., ideological, moralistic, historical) together with increasing antagonism and emulation will only deepen the conflict, bringing humanity to the brink of a third world war.

THE STATE OF DEMOCRACY IN THE WORLD WILL LIKELY DECLINE FURTHER AMID GEOPOLITICAL CONFLICT.

The Democracy Index[13] of the Economist Intelligence Unit (EIU), for example, has found a general declining trend in the state of democracy[14] around the world. In 2024, only 7.8% of the world's population lives in full democracies identified by a set of 60 indicators. The majority of the world's population lives in flawed democracies (37.6%), hybrid regimes (15.2%), and authoritarian regimes (39.4%). Democratic governance is a highly complex issue that requires nuanced analysis and qualification to avoid drawing simplistic conclusions. Geopolitical conflict could spur populist and authoritarian tendencies especially in flawed democracies and hybrid regimes.

Figure 5 *Democracy Index 2023, global map by regime type. Source: EIU.*

Full democracies
- 9.0 – 10.0
- 8.0 – 9.0

Flawed democracies
- 7.0 – 8.0
- 6.0 – 7.0

Hybrid regimes
- 5.0 – 6.0
- 4.0 – 5.0

Authoritarian regimes
- 3.0 – 4.0
- 2.0 – 3.0
- 0 – 2.0

No data

This decade will be characterised by increased militarisation. Weapons will become the focus of attention of the great powers and their allies, seeing them as necessary for their protection, survival or domination. The possession of advanced weapons, and the projection and use of military power, will be the primary means to achieve the desired ends in foreign policy. In effect, military power will overshadow diplomacy. Arms sales will surge in the next decade.[15] The military industry of the great powers will profit significantly from international arms sales, primarily to the members of their alliances. Cutting-edge technologies, also augmented by AI, will help develop more lethal weapons (e.g., aerial and underwater drones, missiles, lasers, biological weapons).[16]

This will be one of the main preoccupations of the great powers and will trigger a new arms race. Growing militarisation trends will be observed in many parts of the world — especially in areas of major geopolitical and economic importance (e.g., Europe, Indo-Pacific, Arctic[17] and Space). Advanced weapons will likely be deployed in orbit around Earth targeting the satellite infrastructure. The EU will develop its military capabilities in an increasingly hostile environment. Middle powers and other countries will also invest heavily in various offensive and defensive weapons. Several countries will try to develop nuclear weapons capabilities as a deterrent. This will lead to an expansion of nuclear arsenals from the current level of 12 000 warheads shared between nine countries.[18]
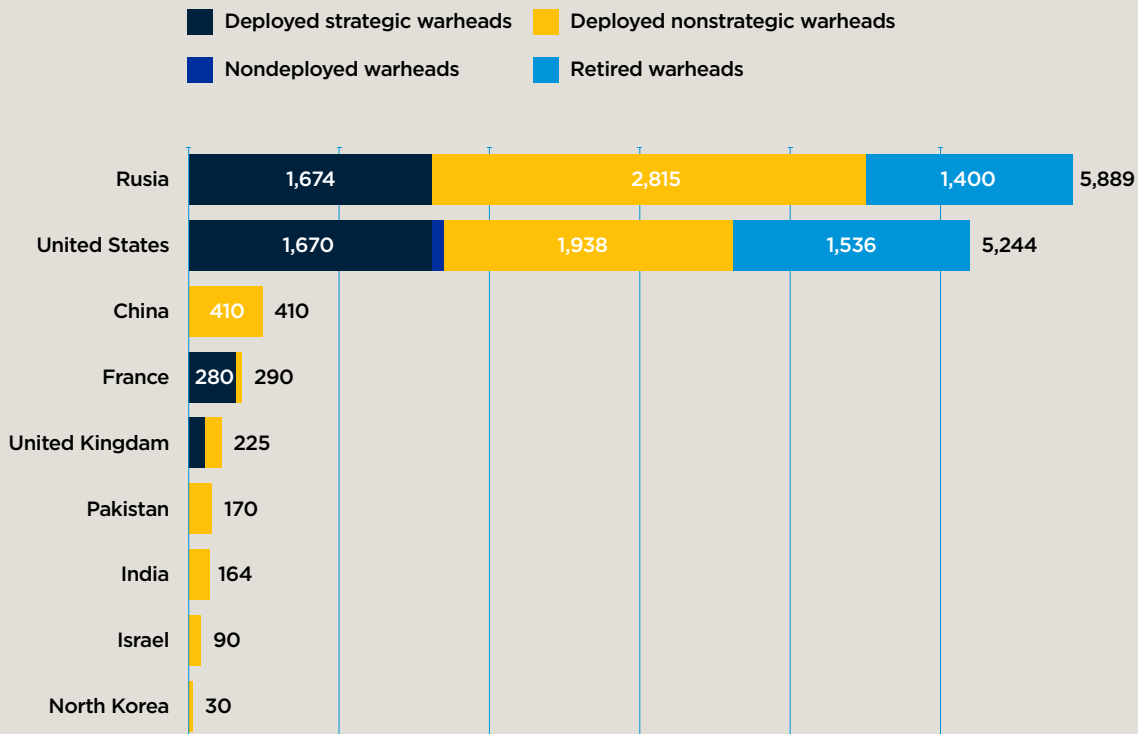
Legend:
- Deployed strategic warheads
- Deployed nonstrategic warheads
- Nondeployed warheads
- Retired warheads

Country	Deployed strategic	Deployed nonstrategic	Retired	Total
Rusia	1,674	2,815	1,400	5,889
United States	1,670	1,938	1,536	5,244
China		410		410
France	280			290
United Kingdam				225
Pakistan				170
India				164
Israel				90
North Korea				30

Figure 6   *Estimated nuclear warhead inventories 2023. Source: Federation of American Scientists (2023), Our World in Data.*

IN THIS PERIOD OF CONFLICT, WEAPONS WILL SERVE AS BUSINESS AND COLLECTIVE SYMBOLS OF FIGHTING CAPABILITIES.[19]

Their development, acquisition and use will be seen as necessary and reasonable by all sides. Copying of better weaponry and military tactics will be a common practice. Nuclear weapons will be demonstrated as the ultimate tool and become part of the aggressive tactics. The appeals of the Secretary-General of the United Nations and other advocates of peace to 'stop the madness' and focus instead on disarmament and non-proliferation will be disregarded as 'too idealistic'.[20] Instead, the conflict in all its forms, and the militarisation trend, will be defended as the only realistic option.

EVENTS IN THIS DECADE WILL PROVIDE ANSWERS TO SOME KEY QUESTIONS.

Will the great powers avoid an all-out war between them? How will the great powers act in the pursuit of geopolitical victory? How will the great powers act in the face of defeat? Will they use nuclear weapons? Will they negotiate and agree on a new international order? Is there any room for a negotiated settlement between them? Is it possible to steer humanity towards peace? History has taught important lessons about war and peace (e.g., World War II, creation of the European Union, the Cuban Missile Crisis, the Vietnam war, collapse of the Soviet Union, and several armed conflicts in recent history), but it has not changed human nature, the fundamental essence of conflict or the uncertain outcomes of war.

ALL PARTIES TO THIS CONFLICT KNOW WELL THAT A WAR PRIMARILY FOUGHT WITH NUCLEAR WEAPONS WILL HAVE NO WINNER.[21]

Global catastrophe will be the guaranteed outcome of an all-out nuclear war, in line with the doctrine of 'mutually assured destruction' (MAD). Nonetheless, the great powers will push the limits hard in the pursuit of their strategic ends. In this fight, cognitive errors, flawed assessments and miscalculated actions, including by artificial intelligence, could prove disastrous. Conflict might not escalate to a direct confrontation and all-out war between the great powers because of its catastrophic consequences. But the conventional and hybrid polemic will be long-lasting, and expand into all other fields, with the purpose of eventually exhausting rivals and causing their capitulation.

THE INSTRUMENTALISATION OF MEGATRENDS WILL ALSO HELP RIVALS ACHIEVE THEIR GEOPOLITICAL OBJECTIVES.

The geopolitical conflict will necessitate the use of all means of hard and soft power to counter enemy plans and actions. The rivals will employ various proxy strategies, including the use of megatrends as tools of foreign policy, to exert pressure and wear down their opponents. This will avoid the extreme dangers of direct confrontation between the great powers. Besides regional and proxy wars, the rivals will employ trade wars, tariffs and economic sanctions as well as hybrid interference, turning the world into an arena of confrontation that will determine everything else.[22]

EVEN THOUGH TRUTH WILL BE MANAGED AND MANIPULATED BY ALL PARTIES, IT WILL ALSO PROVIDE HOPE AND OPPORTUNITIES TO AVOID AT LEAST THE WORST EFFECTS OF GEOPOLITICAL CONFLICT.

Problems will be represented in ways that both deepen and widen the scope of conflict.[23] Honest assessments and initiatives to transcend this regressive state of affairs, mend relations and focus on peaceful arrangements will be disregarded. But the widening polemic and arms race, will not offer much protection because actions and counteractions of the rivals will likely offset one another without offering supreme advantages. Essentially, it will be an exercise in resilience as the rivals will be doubling down on their efforts, exhausting their resources, and causing socioeconomic harm to their populations.

THE INTERNATIONAL UPHEAVAL WILL EVENTUALLY HAVE POLITICAL COSTS FOR ALL SIDES, CREATING SOCIETAL BACKLASH AND RESISTANCE TO THE DANGEROUS POLEMIC ESCALATION.

The risk of 'mutually assured delegitimisation' will loom large over the highly confrontational political positions and actions of the rivals.[24] The consideration of the broader costs of conflict vis-à-vis the potential outcomes of conflict (e.g., a lose-lose situation[25]) will also play an important role in the delegitimisation process. There will be popular support for a vision of peaceful co-existence and cooperation promoted through the United Nations. In many countries, public opinion, academia and industry sectors will shift to the side of peace. Humanistic approaches will urge powerful actors to rise above the conflict and abandon dichotomous perceptions of self and other.[26] From the perspective of common humanity, they will demand that warring elites stop seeing the conflict as a zero-sum game, resolve the geopolitical crisis, and look at other major issues of concern (e.g., environmental issues, global public goods). This will provide more than a glimmer of hope, but it will not be decisive, as powerful actors will continue to be locked in polemic mode.

The increasing calls for political and diplomatic negotiations will create serious sociopolitical tensions between the supporters of peace and conflict. Tensions will be experienced in other policy areas such as climate change and inequalities.

THE ONGOING GEOPOLITICAL CONFLICT, THE WEAPONISATION OF RIVALS', AND THE MILITARISATION TREND WILL HAVE IMPLICATIONS FOR EUROPEAN IBM.

The deterioration of international cooperation will pose challenges in the context of EU border and migration management. Frontex and its partners at national level will make strategic and operational adjustments to address existing and new threats at the EU's external borders. Potential responses could include the following:

▸ increasing the number and availability of Standing Corps staff for operational deployments in proximity to conflict areas;

▸ enacting legislation to address legal vulnerabilities (e.g., instrumentalisation of migration);

▸ implementing special operational responses to address hybrid interference;

▸ developing operational capabilities and capacities; and

▸ improving crisis preparedness.

Due to the complexity and scope of hybrid threats in hot and cold phases of the geopolitical conflict, intelligence/risk assessments and scenarios will inform strategic and operational decision-making.

GROWING INEQUALITIES

INEQUALITIES IN DEVELOPED AND DEVELOPING SOCIETIES WILL BE AMONGST THE PRIME CAUSES OF SOCIETAL GRIEVANCES, TENSIONS AND CONFLICT AS WELL AS ONE OF THE KEY DRIVERS OF DOMESTIC, REGIONAL AND INTERNATIONAL MIGRATION.

Inequalities are produced by all structures and systems that represent different forms of authority, governance, and power (e.g., political, governmental, corporate). These can be traced across a broad array of socioeconomic issues that discriminate or create insuperable barriers for individuals, groups and communities. This happens within and across developed and developing societies. For instance, inequalities have been identified at both macro and micro level concerning the distribution of COVID-19 vaccines.[27] Also, the economic model with fossil fuels at its heart, which has caused the climate crisis, is intertwined with powerful political and business interests that drive socioeconomic inequalities.[28] Low-income countries of the world that experience some of the worst effects of the climate crisis are victimised by the major carbon-emitting countries and petrochemical corporations as well as the slow process of decarbonisation and green transition.

BOTH AUTHORITARIAN REGIMES AND LIBERAL MARKET ECONOMIES PRODUCE A WIDE RANGE OF INEQUALITIES.

Powerful actors focus on the maintenance of the status quo and promotion of their interests using all means available (e.g., accumulating wealth and privileges, violating human rights, blocking positive changes in society, spreading ideologies and propaganda, using violence). 'State capture' by oligarchic interests, and crimes of the powerful[29], compound inequalities that affect whole populations. Major corporations around the world overexploit natural and human resources generating extremely high profits and paying minimal or no income tax. At interstate level, many countries try to increase their autonomy and protect themselves from unfair economic advantages and power asymmetries (state protectionism). At national level, inequalities grow due to various structural and systemic factors (e.g., institutional policies and beliefs, economic power-dependence relations, limited educational and employment opportunities, xenophobia and racism). Socioeconomic inequalities are also exacerbated by the geopolitical conflict and economic competition, which interferes with human security and development priorities.[30]

IN THE NEXT DECADE, THERE WILL BE INCREASED UNDERSTANDING OF THE ROLE OF POWERFUL ECONOMIC AND POLITICAL ACTORS IN THE CREATION AND PERPETUATION OF STRUCTURAL AND SYSTEMIC INEQUALITIES.

Political and corporate elites determine the way of life for the many, who face a host of systemic and structural inequalities.[31] The creation of a more equal world will be resisted by elites that benefit from the perpetuation of social inequalities, power asymmetries and conflict. Highly polarised societies will likely experience a backlash against these elites. Large segments of societies will aim at social transformations through voting, political representation, social mobilisation, activism and forms of violent and non-violent revolt. Their efforts will resonate across national borders, creating international movements against inequality and its effects. This will feature prominently in popular discourse and political agendas. Future research by academia and civil society groups will help identify, and draw attention to, various sources of inequality (e.g., violations of human rights, injustices, poverty, unemployment, poor education, limited healthcare, unproductive invest-

ments, extreme corporate and private wealth creation[32], tax avoidance by the super-rich and multinational companies, luxurious lifestyles and overconsumption, commodification[33], zemiology of politics[34], political misrepresentation, legitimacy and accountability issues, democratic deficit) facilitating political dialogue and the formulation of effective equity-oriented policies.

ADDRESSING INEQUALITIES EFFECTIVELY WILL BE ESSENTIAL FOR HUMAN DEVELOPMENT[35], SOCIAL PROGRESS, INTERNATIONAL SECURITY AND COOPERATION.

Inequality in all its forms affects the human rights of individuals, groups, communities and societies, threatening their way of life. Reducing inequalities will help overcome serious sociopolitical, economic and security problems. Reimagining world politics inside a more equal world will be essential in steering humanity in the direction of peaceful co-existence and cooperation.

CROSS-BORDER INEQUALITIES AND THEIR EFFECTS WILL RECEIVE POLITICAL ATTENTION TO ADDRESS MATTERS OF FOREIGN POLICY, INCLUDING ISSUES PERTAINING TO EU BORDER AND MIGRATION MANAGEMENT.

Addressing the root causes of international migration, cross-border crime and terrorism also relates to the pervasive influence of inequalities and conflicted social life. At the heart of inequality are various asymmetries, elitist and oligarchic privileges, unfair distribution of wealth, exploitation, limited opportunities, injustices and human rights violations that create law and order phenomena, societal grievances and unrest. Assessing the impact of inequalities in third countries as one of the big problems of the world (e.g., 17 sustainable development goals of the UN 2030 Agenda[36], crimes of the powerful[37], extreme corporate and private wealth[38]) will be required to inform better policies and operational responses.

IN THE FUTURE, EUROPEAN IBM SHOULD BE MORE AWARE OF THE SOCIAL HARMS OF INEQUALITY IN THIRD COUNTRIES TO FULFIL ITS MISSION MORE EFFECTIVELY AND HUMANELY.

A more unequal world characterised by the extreme concentration of power, wealth and resources will exacerbate the levels of inequality and conflict as well as the adverse effects on thematic areas (e.g., migration, cross-border crime, terrorism). Growing inequalities, in combination with armed conflicts, economic instability and social unrest, will continue to drive economic migrants and refugees to Europe in search of a better life through existing and new routes. This will increase pressure on EU border management.

INTERNATIONAL GOVERNANCE SYSTEMS

INTERNATIONAL GOVERNANCE SYSTEMS ARE CRUCIALLY IMPORTANT IN RESOLVING THE BIG PROBLEMS OF THE WORLD, BUT THE ONGOING GEOPOLITICAL CONFLICT WILL HINDER THE WORK OF INTERNATIONAL ORGANISATIONS.

As a result, the role of these organisations will be largely symbolic since trust and cooperation between the countries will be seriously lacking. International cooperation through the United Nations' bodies and agencies will be unable to resolve major issues of concern. Even though there is a plethora of actors in world politics,

they will be unable to solve the problem of international governance and order in a hostile multipolar world. Nonetheless, there will be growing emphasis on transparency and equitable participation in global fora as well as collective pressure to find effective solutions to global problems (e.g., geopolitical conflict, climate change, inequalities).

INTERNATIONAL POLICIES THAT AIM AT 'MANAGING' SHARED PROBLEMS IN THE SHORT TO MEDIUM TERM, OR DEFER THEIR SOLUTION TO THE FUTURE, CANNOT ENGAGE IN GRAND 'PROBLEM-SOLVING' THAT PROVIDES LONG-TERM SOLUTIONS.

Since international organisations are inadequately supported by the world community to address the root causes of global problems, they cannot provide lasting solutions (e.g., 17 sustainable development goals of the UN 2030 Agenda, North-South gap).

INTERNATIONAL GOVERNANCE AND ORDER WILL BE ESSENTIAL IN A WORLD THAT MOVES AWAY FROM PEACE AND IS INCREASINGLY CONSUMED BY GEOPOLITICAL CONFLICT AND GEOECONOMIC COMPETITION.

While countries of the world go it alone or as part of alliances in a hostile environment, certain grand policy questions remain: How can humanity become truly civilised? How do you promote a vision of peaceful co-existence and cooperation? How to end unnecessary polemic and human suffering? How to close the global leadership and governance gap? How to engage in problem-solving that offers lasting solutions? These and other questions hinge on a shared grand vision for humanity that apparently the world community is not yet ready to support.

EXPANDING INFLUENCE OF THE GLOBAL EAST AND SOUTH

NOTWITHSTANDING EXISTING POWER ASYMMETRIES, THE INFLUENCE OF THE GLOBAL EAST AND SOUTH WILL CONTINUE TO DEVELOP OVER THE NEXT DECADE CREATING A DE FACTO MULTIPOLAR[39].

Emerging economies and developing countries in the global south will maintain a largely neutral stance in the geopolitical conflict between the US, the EU, Russia and China. They will keep a distance from the conflict and its harmful effects, demonstrating careful engagement and geopolitical pragmatism. They will promote their national interests by focusing on key regional developments and cooperation initiatives (e.g., BRICS, Shanghai Cooperation Organization)[40]. The geopolitical influence of China, India, South Africa, Brazil and other countries in the global south will likely increase along with the development of their socioeconomic, technological and military power.

THE WORLD'S CENTRE OF GRAVITY WILL GRADUALLY SHIFT TO THE EAST SINCE THE INDO-PACIFIC REGION CONSISTS OF 4.2 BILLION PEOPLE (I.E., MORE THAN 50% OF THE WORLD'S POPULATION).

The geopolitical/economic importance of the Indo-Pacific will increase mainly due to the rise of China and India and the dynamics of this massive regional market. Its geopolitical influence may also increase if the countries of the region engage in closer political, economic and security cooperation. An Asian economic and security bloc could emerge in response to

the risks of globalisation and dependence on western financial systems.[41] One of the key challenges will be whether the ongoing geopolitical conflict vis-à-vis regional perspectives will obstruct or provide opportunities for multilateral cooperation in various areas (e.g., economic markets, trade, industrial production, scientific research, technological innovation, migration, security). In this context, China's Belt and Road Initiative (BRI), which aims at creating land and maritime routes from southeast Asia to Africa, the Middle East and Europe, as well as across the Arctic, will influence geopolitical/economic developments too.

THE STRUCTURAL INEQUALITIES AND ASYMMETRIES BEHIND THE NORTH-SOUTH GAP THAT WERE IDENTIFIED BY THE 1980 'BRANDT REPORT'[42] STILL PERSIST.

As a result, the politico-economic grievances and dissatisfaction of the South will continue to strain international politics. South-South cooperation will likely develop in the next decade, and it remains to be seen whether the G77 group[43] will further evolve and assert a more influential geopolitical and geoeconomic role. Bridging the existing North-South gap and streamlining cooperation will likely reemerge as a matter of grand policy.[44] But the development of North-South cooperation would need to revisit those issues that remain as yet unresolved.

COOPERATION WITH COUNTRIES OF THE GLOBAL EAST AND SOUTH WILL MATTER SIGNIFICANTLY IN THE CONTEXT OF EU BORDER MANAGEMENT TOO.

While some emerging economies will become alternative destination countries for economic migration, the EU will continue to be a prime destination for economic migrants and refugees from the developing countries of the global east and south. The technical and operational cooperation between Frontex and the competent authorities of global east and south countries will mainly depend on the level of their political cooperation with the EU. Strained relations might not favour cooperation with certain countries of origin and transit of international migration. In any case, international cooperation will be crucially important in addressing phenomena of interest to European IBM (i.e., irregular migration, returns, cross-border crime, terrorism and hybrid threats).

CLIMATE CHANGE

ONLY CONCERTED AND ROBUST CLIMATE ACTION BY THE WORLD COMMUNITY WILL AVERT AN ENVIRONMENTAL CATASTROPHE AT PLANETARY SCALE.

In December 2023, the UN Climate Change Conference (COP 28) marked the first global stock take (GST) on this megatrend. The conference was attended by 150 heads of state and government and 85 000 participants.[45] The draft decision[46] reflected a negotiated consensus about 'the 'beginning of the end' of the fossil fuel era', including climate funding arrangements and a 'loss and damage' fund.[47] The conference showed that there is greater understanding of the lengthy and complex transition process from fossil fuels to renewable energy sources with the purpose of reaching net zero carbon dioxide emissions by 2050. The phasing out of fossil fuels and the diversification of energy sources should be a carefully managed process to avoid potential energy security risks or economic crises. The IEA's (International Energy Agency) executive director has emphasised the need to develop clean energies (i.e., renewable energy sources, energy efficient technologies, nuclear power).[48] But a major oil industry con-

ference[49] echoed the view of a top oil executive that 'we should abandon the fantasy of phasing out oil and gas' pointing at the massive investments of the oil industry vis-à-vis the growing industrialisation and energy needs of Asian and African countries.[50] The output of oil companies from existing and new oil and natural gas fields is expected to quadruple by the end of this decade.[51] Hence, the major dependence of the global economy on oil and natural gas as well as the vested interests of major oil corporations and oil-producing countries cast doubts on the practical feasibility of ending the fossil fuel era in the coming decades. However, societal pressure will intensify government accountability for taking measures that address climate change effectively. Any shortcomings will be seen as human rights violations resulting in litigation cases.[52]

CURRENT PROJECTIONS SUGGEST THAT CLIMATE CHANGE WILL LIKELY CONTINUE TO WORSEN IN THIS DECADE DUE TO THE INSUFFICIENT AND/OR INCONSISTENT IMPLEMENTATION OF MEASURES BY THE WORLD COMMUNITY.

The international fossil fuels industry (coal, oil and natural gas)[53] currently dominates global energy production and will further increase its output[54] this decade, offsetting the benefits of green transition initiatives. As a result, the global average temperature will keep increasing (see Fig. 7). The ongoing geopolitical conflict is another challenge that may impede common efforts to control climate change. So it remains to be seen whether, in the course of this decade, the COP 28 decision will signify a positive step towards the attainment of the +1.5°C target set by the Paris Agreement in 2015.

Global monthly temperature anomaly

Combined land-surface air and sea-surface water temperature anomaly, given as the deviation from the 1951-1980 mean, in degrees Celsius.
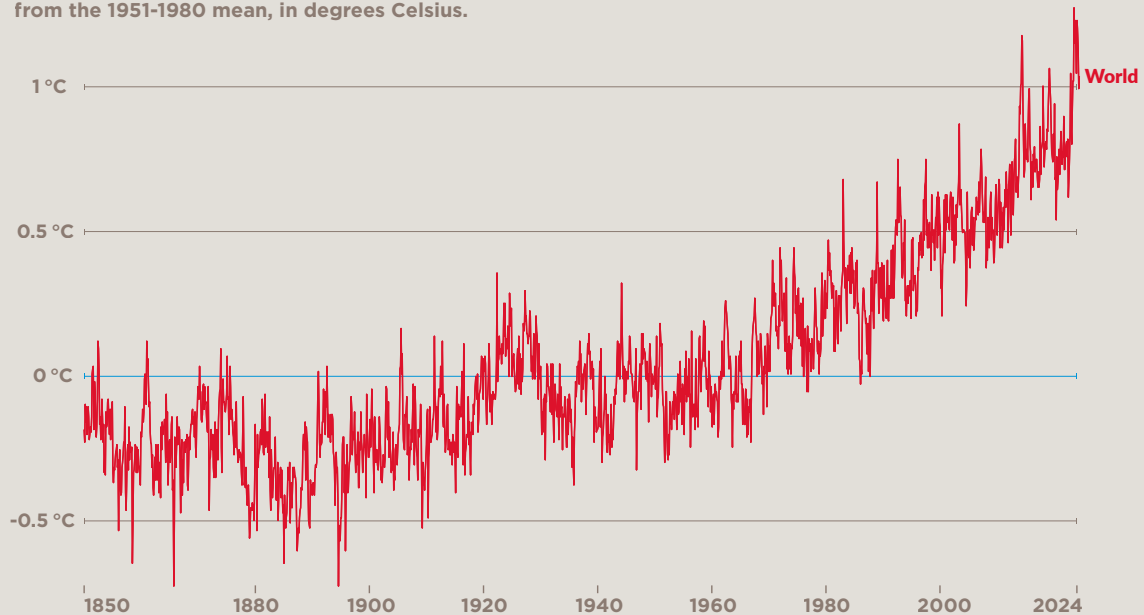
Data source: NASA Goddard Institute for Space Studies - GISS Surface Temperature Analysis (2024)
OurWorldInData.org/climate-change | CC BY

Figure 7   Global warming — monthly temperature anomaly. Source: NASA, Our World in Data.

THE DECARBONISATION OF THE GLOBAL ECONOMY AND GREEN ENERGY TRANSITION WILL BE A LONG-TERM PROCESS WITH UNCERTAIN OUTCOMES. UNLESS THE WORLD COMMUNITY — AND ESPECIALLY THE FOSSIL FUEL INDUSTRY — TAKES EFFECTIVE STEPS, HUMANITY WILL FACE AN OMINOUS CLIMATE FUTURE.

The scientific community has long been providing evidence of climate change[55] and warning about its dire consequences. The Intergovernmental Panel on Climate Change (IPCC) has visualised alternative scenarios of possible climate futures in the form of an interactive atlas that paints a bleak picture for the Earth's ecosystems and human societies.[56] Humanity must keep global warming below the +1.5°C limit because any warming scenarios above this critical threshold (i.e., between +2°C to +5°C) would have grave consequences that must be avoided at all costs. Major strides in policy implementation and preparedness will be required in the EU to address climate-related risks and adaptation needs as Europe is the fastest-warming continent in the world.[57]

In its first risk assessment, the European Environment Agency (EEA) identified climate risks and priorities across five risk categories: ecosystems, food, health, infrastructure, economy and finance. Moreover, it warned that climate change is a major risk multiplier that can cascade across systems and borders causing great harm.

CLIMATE ADAPTATION AND SUSTAINABILITY MEASURES REQUIRE URGENT AND COORDINATED ACTION BY ALL COUNTRIES, INTERNATIONAL ORGANISATIONS, THE OIL INDUSTRY, MULTINATIONAL CORPORATIONS AND SOCIETY AT LARGE.

Action across policy domains is essential due to the complex interplay between climate change and other megatrends (e.g., environmental degradation, resource scarcity, inequalities, public health). For example, future 'hothouse'-Earth conditions could aggravate heat-related mortality[58] and result in a more frequent occurrence of epidemics and pandemics.[59]

The climate emergency raises the question of whether climate-related decisions, scientific advice and civil society calls for action are heeded enough (e.g., COP 28 decision, IPCC Sixth Assessment Report)[60]. The world community must do much more to stem the climate crisis. All societies and organisations — including Frontex — should reduce their carbon footprint and embrace sustainability in support of the global effort to mitigate the adverse effects of climate change. If climate change worsens, it will have disruptive and irreversible effects for humanity and the environment (e.g., ecosystem and biodiversity loss, deterioration of agriculture, water sources and public health, and increased natural disasters). Although climate change affects all countries, low-income countries will be impacted disproportionately. Climate change will also affect domestic, regional and international migration.[61] Extreme climate scenarios could force major population movements to habitable areas of the world.[62]

Tipping elements at risk

- 1°C - 3°C
- 3°C - 5°C
- \> 5°C

Figure 8 *Global warming scenarios and tipping elements at risk.* [63]

ENVIRONMENTAL DEGRADATION AND RESOURCE SCARCITY

ENVIRONMENTAL DEGRADATION AND RESOURCE SCARCITY WILL EXACERBATE OVER THE NEXT DECADE BECOMING SOURCES OF GEOPOLITICAL CONFLICT, INTENSE ECONOMIC COMPETITION OVER FINITE RESOURCES, AND ENERGY CRISIS. THESE ISSUES WILL ALSO WORSEN SOCIO-ECONOMIC INEQUALITIES.

Our societies' overuse of the ecological resources of the planet destabilise its regeneration capacity.[64] The ecological overshoot has been growing over time, also due to an increasing world popu-lation.[65] The Anthropocene period — character-ised by large-scale human activities that alter the physical environment — destroys the planet at a scale never seen before.[66] Human-induced changes to the atmosphere, oceans, biosphere and geochemistry of the Earth are being care-fully examined by the scientific community.[67] Scientists have been urgently calling for the need to address environmental degradation[68] and resource scarcity (e.g., water, food, critical raw materials[69], rare earth elements, energy sources). This requires coordinated interna-tional responses across policy domains since this megatrend results from highly complex processes and interacts with other megatrends such as geoeconomics (incl. strategic auton-

omy), geopolitics and security, climate change, urbanisation and consumerism. Securing the critical raw materials (CRMs) necessary for the EU's industrial production (incl. green transition) through recycling and mining will pose challenges to the EU's strategic autonomy.[70]

A 'HUMAN BEHAVIOURAL CRISIS'[71] HAS BEEN IDENTIFIED AS ONE OF THE ROOT CAUSES BEHIND THE ECOLOGICAL OVERSHOOT.

This is not a novel insight[72], but it is an insight that perhaps has the broadest scope of policy implications. Despite great societal progress in the 21st century, human nature has also been responsible for a plethora of regressive behaviours that are behind environmental exploitation, overproduction and overconsumption[73], climate change, biodiversity loss and extinction of species[74], geopolitical conflict, insufficient attention to the major problems of the world, and the protection of global public goods. Unrestrained corporate and private interests ('free market forces') and super-rich, luxurious lifestyles that are spreading across the middle classes result in 'unproductive activities' and 'conspicuous consumption'[75] on a massive scale. This behaviour is causing unprecedented levels of environmental degradation and resource scarcity. The overexploitation of everything on this planet by humans was the subject of the 1972 classic report commissioned by the Club of Rome, 'Limits to Growth'[76]. A better model is required to manage the complex parameters of human population, agricultural and industrial production, financial investments, use of natural resources and environmental pollution, because continuous growth is unsustainable. This will continue to be a grand policy issue of utmost importance.

ECONOMY AND ENERGY

THE INTERPLAY OF THE ECONOMY WITH CERTAIN MEGATRENDS WILL HAVE KNOCK-ON EFFECTS EXACERBATING ECONOMIC CHALLENGES IN THE TURBULENT DECADE AHEAD.

All economies are highly interdependent within the global economic and financial systems. Economies depend on and interact in highly complex ways with numerous variables, such as the production and trade in energy sources, intense geoeconomic competition, soaring global debt (private and public), hostile geopolitics and security conflicts, disruptions in international supply chains[77], rising inflation and cost of living, growing socioeconomic inequalities, green energy transition, and transformational technological advances (e.g., AI revolution). These and other factors will require innovative cross-domain research and effective policy responses. As the world steers into new and uncharted territories driven by developments across all megatrends, it will be crucial to identify major risks (including unknown unknowns) and manage potentially catastrophic cascades in the field of economy.

AN INTERNATIONAL DEBT CRISIS IS ON THE HORIZON.

The foreseen crisis, according to Roubini, will be massive, affecting countries, regions and perhaps the whole world.[78] There will be many potential triggers such as inflation, corporate debt, pandemics, escalating geopolitical conflict and/or protectionist policies (e.g., decoupling, tariffs, sanctions) that restrict international trade. Unable to service their massive debts, countries will go bankrupt or face recession that will stifle their economic growth. Advanced economies, emerging market and low-income countries could all be hit hard.[79] The situation in low-income countries

could force their citizens to migrate in search of a better life. In this scenario, due to unsustainable debts, there will be limited policy options for economic stability or recovery. Any remedial action (e.g., economic austerity or stimulus measures) will have side effects. Mass protests and social unrest stemming from socioeconomic and political grievances could destabilise both democratic and authoritarian countries. In the EU, countries such as Greece, Portugal and Italy would be more vulnerable due to the high level of their sovereign debts.[80] In a worse-case scenario, even the stability of the Eurozone could be at risk.

DESPITE CONSIDERABLE GREEN TRANSITION EFFORTS, THE EU'S ECONOMY WILL REMAIN DEPENDENT ON FOSSIL FUEL ENERGY SOURCES (CRUDE OIL, NATURAL GAS) OVER THE NEXT DECADE.

Socioeconomic vulnerabilities and impacts will require adaptations sparking political debates on policy options at national and EU level. Inflation and high costs of living will be experienced as a result of the EU's limited energy autonomy. The diversification of energy supplies (oil and natural gas) will likely incur higher costs in a competitive global market. Energy supplies from existing and new sources of fossil fuels will draw criticism about the EU's ongoing dependence on fossil fuels vis-à-vis the roadmap for green energy transition.

TECHNOLOGICAL ADVANCES

MAJOR TECHNOLOGICAL PROGRESS, MAINLY DUE TO THE AI REVOLUTION[81], WILL BE BOTH TRANSFORMATIVE AND DISRUPTIVE FOR HUMANITY.

AI will bring about innovative applications across all business domains changing the global economy and the nature of work and employment as we know it.[82] Intelligence automation, robots, the Internet of Things (IoT) and quantum computing will be at the heart of this technological change. AI-powered automation and digitalisation will enable the development of intelligent machines that could change the processes of production and the labour market, as well as creating new industries. The control of AI knowledge and business applications will be an extremely important issue for regulatory and governance purposes.[83] Millions of jobs could be lost to future AI applications. This will require the adoption of new policies (e.g., upskilling and reskilling various categories of employees, compensation schemes). Moreover, the concen-

tration of superior AI technology in the hands of a limited number of countries and major corporations will increase global inequalities to extreme levels. These countries will have to introduce socially responsible, ethical and fair policies as well as manage the risks of misuse and abuse of AI knowledge.

THE FORESEEN EFFECTS OF THE AI REVOLUTION WILL BE MAGNIFIED IF 'ARTIFICIAL SUPERINTELLIGENCE' — A FAR MORE INTELLIGENT AI FORM THAN HUMAN INTELLIGENCE — IS DEVELOPED WITHIN THE NEXT DECADE.

The possible development of a superior 'software brain' could pose existential — risks for humanity.[84]

THE DEVELOPMENT OF AI-RELATED TECHNOLOGY AND ITS APPLICATIONS WILL DRIVE AN 'AI ARMS RACE' BY THE GREAT POWERS, THE MILITARY AND MAJOR CORPORATIONS.

The economic competition together with the geopolitical and security conflict will turn AI into another area of confrontation. The control of AI technology, AI-powered means of production and numerous business applications will be extremely important for all countries. The great powers, the military and major corporations will be at the forefront of this technological revolution. These players will benefit disproportionately compared with all other actors. The development of AI-guided technologies and weapons will drive an AI arms race that will revolutionise military capabilities, raising serious ethical questions.

AI APPLICATIONS WILL BE A MAJOR ENABLER FOR ILLICIT ACTIVITIES ACROSS THE SPECTRUM OF SERIOUS AND ORGANISED CRIME[85], CYBERCRIME[86], TERRORISM AND HYBRID THREATS.

The democratisation of conventional AI technology and its numerous applications will create security risks. AI tools will empower criminal and terrorist networks helping them gain high profits and inflict societal harm. AI crime and terrorism could become distinct forms of crime and terrorism respectively.

THE AI REVOLUTION WILL HAVE BOTH POSITIVE AND NEGATIVE DIMENSIONS FOR EU BORDER MANAGEMENT.

At the same time as enabling crime and other threats to EIBM, as well as AI cyberattacks against EU border infrastructure, AI applications could be used to improve the capabilities of Frontex and national authorities (e.g., AI-powered systems and tools for border checks, border surveillance, and intelligence/risk assessment).

MAJOR ADVANCES ARE EXPECTED IN VARIOUS TECHNOLOGICAL FIELDS, SUCH AS: QUANTUM COMPUTING, GEOENGINEERING, BIOENGINEERING (E.G., GENE EDITING), MEDICINE, 3D PRINTING, NANOTECHNOLOGY, SPACE EXPLORATION, AND NUCLEAR FUSION.

Nuclear fusion[87], for example, stands out as another technological area with transformative potential because it can help generate abundant clean energy. Its technical feasibility is still uncertain, which is why it is not included in the green transition process and 'net zero emissions' planning.[88] Nonetheless, a scientific breakthrough in this area could lead to the development of nuclear fusion reactors and the commercialisation of this revolutionary technology. Such a development would have major socioeconomic and geopolitical impacts similar to, or exceeding, those of the AI revolution.

CONCLUSION

GEOPOLITICAL AND SECURITY CONFLICT WILL BE A KEY THREAT FOR HUMANITY AND THE PLANET OVER THE NEXT DECADE.

If the ongoing geopolitical conflict between the great powers and their allies continues unabated, and even spreads in new areas, then humanity may not only face a bleak future, but also existential threats. Considering the catastrophic consequences of direct confrontation, the great powers will likely draw a fine line to avoid an all-out war between them. To achieve their strategic ends, they will weaponise interdependence[89] and use indirect approaches (e.g., proxy wars[90], regional wars, trade wars, alliance formation, hybrid interference and warfare[91]). The conflict below the threshold of war will also expand and intensify on various fronts (e.g., economy, energy, technological change, migration, other megatrends). That is why the next decade will be a period of starkly different, and violently clashing, geopolitical and socioeconomic ambitions and interests.

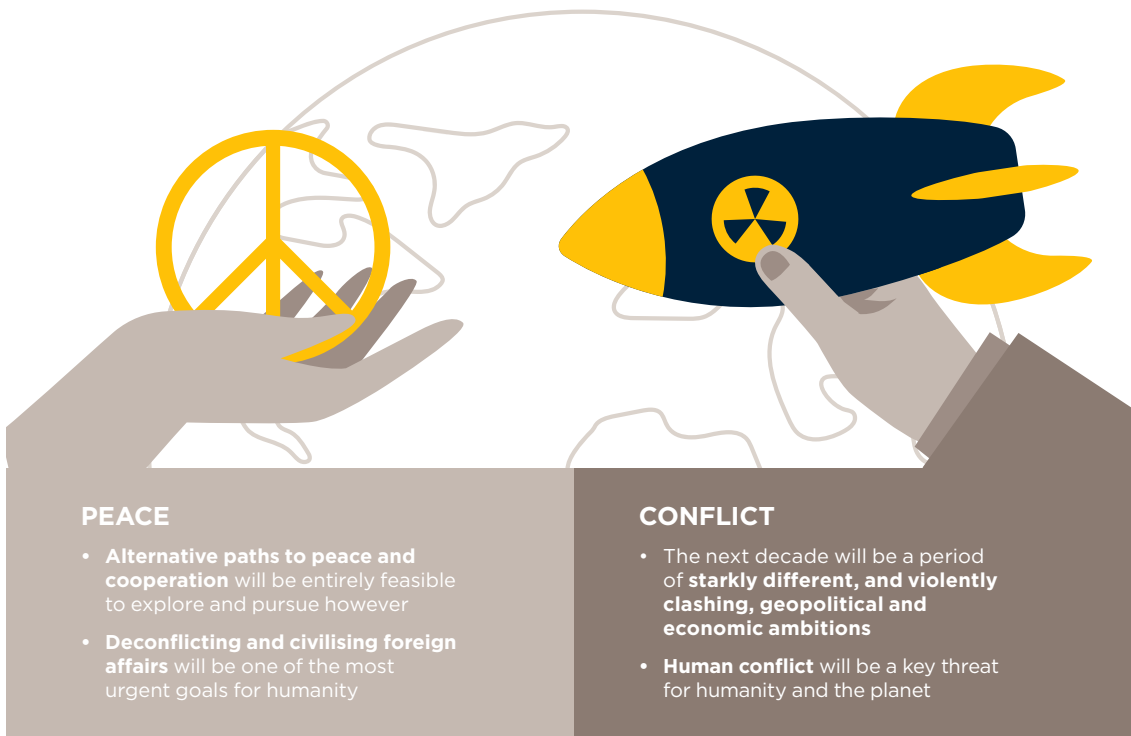### ALTERNATIVE PATHS TO PEACE AND COOPERATION — AWAY FROM PERPETUAL AND EXISTENTIAL CONFLICT — WILL BE ENTIRELY FEASIBLE TO EXPLORE AND PURSUE, HOWEVER. PEACEFUL VISIONS OF THE WORLD WILL LIKELY GAIN STRATEGIC TRACTION.

In the next decade, the solutions to pressing global problems will be increasingly apparent, as well as the barriers to implementing them. A more politically active society will support a better future for all people based on realistic plans. Behind it there will be a shared feeling by the general public and civil society organisations that the implementation of desired visions — such as, civilising international relations, alleviating fundamental human and geopolitical conflict, reducing social harms and inequalities, creating a fairer world, implementing green socioeconomic transformations, managing the risks of revolutionary technologies, and living in a world of peaceful co-existence and cooperation — depends on a major course correction that is long overdue. There will be higher appreciation of the need to pursue these strategic ends, including the means and ways to achieve them. Governments will be held accountable for policies that fail to address major issues (e.g., green transition, inequalities, economic hardships, crimes of the powerful[92], conflict prevention, migration crises). However, it will be hard for organised civil society and society at large to avert major conflict-based trends (e.g., geopolitical/economic competition, security crises, militarisation and a nuclear arms race[93]). The fundamental tension between peace and conflict — including their blurred boundaries and ambivalence — will remain. Building a better world will be hard to imagine amid the geopolitical crisis. Even so, it will be imperative not to lose sight of better futures to avoid being drawn deeper into conflict. Viable paths towards peace, progress and human development might appear through the chaos of conflict too.

DECONFLICTING AND CIVILISING HUMAN AFFAIRS WILL CONTINUE TO BE ONE OF THE MOST URGENT GOALS FOR HUMANITY.

Adversarial conflict has characterised the whole of human history. The world community is enjoying extraordinary progress in this area, while at the same time facing existential risks unlike any other period. How to rise above zero-sum (win-lose) adversarial thinking? How to control regressive human behaviours and excesses that are behind climate change, ecological overshoot and other major problems? International cooperation is the answer. It may not only prevent catastrophic risks, but it may also help articulate and implement a grand vision for humanity.[94]

PEACE
- **Alternative paths to peace and cooperation** will be entirely feasible to explore and pursue however
- **Deconflicting and civilising foreign affairs** will be one of the most urgent goals for humanity

CONFLICT
- The next decade will be a period of **starkly different, and violently clashing, geopolitical and economic ambitions**
- **Human conflict** will be a key threat for humanity and the planet

Figure 9 *The next decade will be a period of intense conflict and contrasting future visions.*

A future of peaceful co-existence and cooperation is as crucial for humankind as the protection of the physical environment. With this in mind, a global stocktake on international relations and peace processes would serve the best interests of humanity.

EUROPEAN IBM SHOULD PREPARE FOR A TURBULENT DECADE AHEAD AND BE READY FOR OMINOUS SCENARIOS.

In the next decade, it will be difficult to manage thematic phenomena due to hostile geopolitics, security instability and the complex interplay of megatrends. EU policies on border and migration management will have to be updated in response to major developments and the need to address threats, challenges and vulnerabilities to EIBM (e.g., migration, cross-border crime, hybrid interference). Frontex will make necessary organisational changes to improve its operational capabilities and performance (e.g., Standing Corps staff, infrastructural development, returns system, intelligence/risk analysis, cooperation with third countries).

ENHANCED TECHNICAL COOPERATION WILL BE REQUIRED BETWEEN FRONTEX AND THE COMPETENT AGENCIES OF THIRD COUNTRIES IN AFRICA, THE MIDDLE EAST AND SOUTH-EAST ASIA ON MIGRATION, RETURNS AND CROSS-BORDER CRIME.

A host of megatrend effects (e.g., economic hardships, technological advances, security crises) will affect international migration, crime and terrorism. Armed conflicts in the EU neighbourhood and hybrid interference by certain third countries (e.g., instrumentalisation of migration, weapons trafficking) will affect the EU's internal and external security. The increasing militarisation trends will also influence EU border management and security, especially on external border sections neighbouring conflict zones. Frontex's performance and effectiveness will depend significantly on the quality of international relations and the level of cooperation between the EU and third countries.

3. Migration and returns

MIGRATION

EU BORDER AND MIGRATION MANAGEMENT WILL FACE MULTIFACETED CHALLENGES IN THE NEXT DECADE.

There is now a better understanding of migration processes, such as the broader structural forces, social changes and critical events that can influence migration decisions. Even so, the causal factors behind migratory trends are difficult to identify, disentangle from highly complex socioeconomic processes and transformations, and address effectively in third countries or in transit and destination countries. Migration phenomena are characterised by multicausality, which renders the formulation of policy responses particularly difficult. Migration decisions are influenced by, among other things, individual aspirations and capabilities, megatrend effects, adaptation and coping strategies at societal level, and legal/illegal opportunities for cross-border mobility. Migrants may predictably decide to stay or move, but they may also act in unexpected ways.[95] That shows, at least in part, why the management of migration is, and will remain, particularly challenging in practice, for all countries of origin, transit and destination.

MIGRATION IS A POLITICAL ISSUE OF UTMOST IMPORTANCE IN EUROPE THAT RELATES TO NATIONAL SOVEREIGNTY, SECURITY, IDENTITY AND WAY OF LIFE.

The new Pact on Migration and Asylum[96] is the outcome of a long process of negotiation and political compromise reached at EU level. A common approach on migration will be difficult to achieve in the future since the Member States will prefer to go-it-alone to protect themselves from its undesired effects. Due to migration geopolitics, and in response to different realities on the ground, Member States will take care of themselves without committing to common approaches on illegal and legal migration. As a result, EU migration policy will continue to revolve around short- and mid-term priorities with an emphasis on operational responses and crisis management. Stricter border controls and accelerated border procedures, as stipulated in the new Pact, might release some of the pressure at the external borders, shifting it towards migration and asylum processes (i.e., reception/detention facilities, screening, appeal, returns). But frontline Member States will continue to face migratory flows through neighbouring third countries of transit and/or origin. The Pact will also promote cooperation with third countries on border and migration management (i.e., prevention of irregular departures, fighting people smuggling, readmission cooperation) helping implement European IBM. The EU will conclude agreements with certain third countries and provide financial incentives to control disproportionate migratory flows. Geopolitical changes will expose the EU's external borders to various threats, including the instrumentalisation of migration. The EU will use the available tools to address crisis situations, but the root causes of migration will remain largely unaddressed.

The amendments to the Schengen Borders Code will enhance the response of border control and migration management authorities to the instrumentalisation of migrant flows, health crises and secondary movements.

REACTIVE POLICIES AND DOMAIN-SPECIFIC OPERATIONAL RESPONSES WILL HAVE LIMITED EFFECTS ON EU-BOUND MIGRATORY AND REFUGEE FLOWS IN THE FUTURE.

Large-scale migration and refugee movements are caused by factors such as armed conflicts and the complex interplay of megatrends. EU border management responses alone, no matter how effective in providing short- and medium-term solutions, can neither address the root causes behind migratory movements and crises, nor provide long-term solutions. Major geopolitical and security conflicts, for example, have a dynamic of their own and their drivers are extremely difficult to manage. The same applies to all other causal factors that influence migration. Migration requires comprehensive responses across policy fields at national, regional and international level to address its root causes and effects. So, migration will continue to be an unavoidable consequence as long as the global community cannot sufficiently resolve the big problems of the world (e.g., hostile geopolitics, armed conflicts, inequalities, economic crises, poverty, unemployment, limited educational opportunities, climate change, environmental degradation). In the absence of a broader grand policy on migration, EU border management will continue to serve mainly as a last-resort strategy.

THE FORMULATION AND IMPLEMENTATION OF A GRAND POLICY ON MIGRATION ALONGSIDE EFFECTIVE CROSS-POLICY DOMAIN COORDINATION AND COOPERATION WITH INTERNAL AND EXTERNAL STAKEHOLDERS WILL EMERGE AS A KEY REQUIREMENT.

The rationale behind this requirement would be the need to:

▸ avoid the vulnerabilities associated with last-resort strategies on migration that provide only short- and medium-term solutions, and

▸ engage in grand problem-solving that provides long-term solutions for EU border and migration management.

A unified response that guarantees the integrity of the EU's external borders and respect for human rights, allows for strategic coordination across EU policy domains, promotes external cooperation with third countries, and effectively addresses legal and operational vulnerabilities and hybrid threats will be crucial for the EU. Both proactive and reactive adaptation will be necessary due to the dynamic and complex nature of migratory phenomena. As noted above, however, potential shifts in EU politics and anti-migration discourse will render the creation of a grand migration policy unlikely within the next 10 years.

MIGRATORY PRESSURES WILL MOST LIKELY INCREASE DURING THE NEXT DECADE, REQUIRING SUBSTANTIAL IMPROVEMENTS IN GENERAL AND CRISIS PREPAREDNESS WITH THE PURPOSE OF IMPROVING THE RESILIENCE OF EUROPEAN IBM AND REDUCING OPERATIONAL AND LEGAL VULNERABILITIES.

EU border and migration management will benefit from improvements across all IBM components to allow for capability development and more effective operational responses (e.g., infrastructure, training, surveillance, information exchange, intelligence reporting, cooperation with third countries). The strengthening of EU border controls at BCPs and surveillance at border sections, the development of analytical, early warning and foresight capabilities, and crisis responses that address cases of migration instrumentalisation[97], can help in avoiding some of the worst effects of disproportionate migratory flows and destabilisation of Member States by hostile third countries and non-state actors. In addition, EU border and migration management would become more effective, humane and future-proof by adopting a broader outlook on border- and migration-related phenomena around the world. Strategic foresight and futures thinking could make valuable contributions by providing broader, future-oriented and actionable perspectives. The latter would help Frontex head towards its desired future while averting, or preparing well to face, ominous ones.

MAJOR SECURITY CRISES THAT OCCURRED BETWEEN 2015 AND 2024 HAVE HAD THE BIGGEST IMPACT ON THE MIGRATORY AND REFUGEE SITUATION IN THE EU AND ITS NEIGHBOURHOOD.

In 2015, more than 1 million migrants and refugees (mostly Syrians) crossed into the EU mainly through the Eastern and Central Mediterranean routes (see Fig. 10). The crisis was driven by armed conflicts and continuous instability in Syria, Iraq and Libya. On 24 February 2022, Russia invaded Ukraine, marking the most serious deterioration of geopolitical security since World War II. The invasion followed from the annexation of Crimea by Russia and the Donbas conflict in 2014. The armed conflict in Ukraine has created the largest refugee crisis in Europe since the second World War. It is estimated that 8 million Ukrainians have been internally displaced, and at least another 8 million Ukrainians have moved to EU Member States and neighbouring countries.[98] Approximately, 4.2 million Ukrainians have benefited from the temporary protection mechanism in the EU (see Fig. 11). In October 2023, the Israel-Hamas war erupted, leading to the Israeli invasion of the Gaza Strip and the internal displacement of 1.5 million Palestinians. The war in Gaza and subsequent developments threaten to destabilise regional and international security further. Here it should also be noted that the crisis in Libya has continued since 2011, with no end in sight, destabilising the country and the north African region. As a result, Libya has become one of the key transit countries for irregular migration to the EU via the Central Mediterranean route.
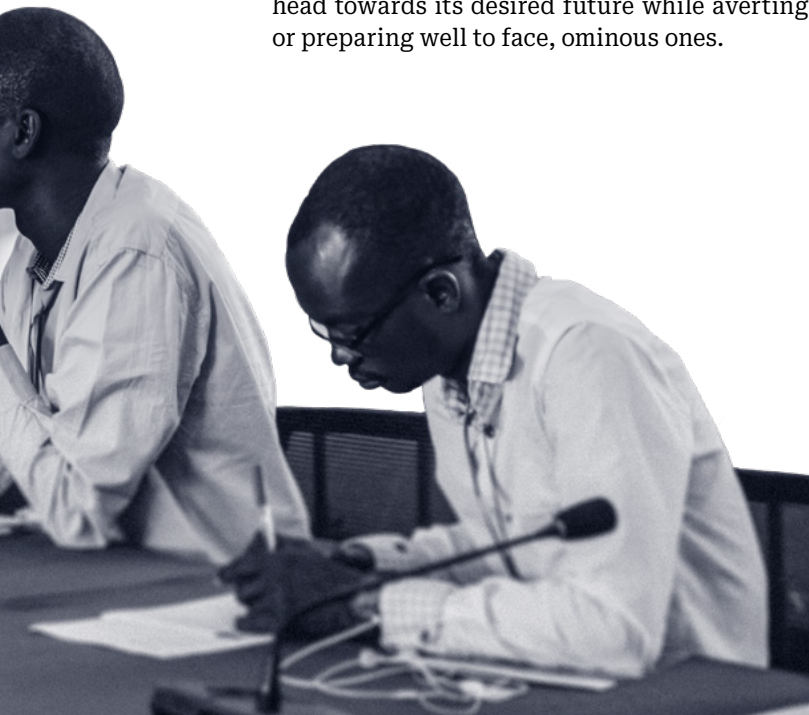
THE ONGOING WARS AND INSTABILITY IN THE EU NEIGHBOURHOOD, TOGETHER WITH ANY NEW SECURITY CRISES, WILL LIKELY BE THE KEY DRIVERS OF MIGRATORY AND REFUGEE MOVEMENTS INTO EUROPE.

The continued war in Ukraine, the civil wars in Libya, Syria and Sudan, the instability in Lebanon, and the ongoing conflict between Iran, Iran's proxies in the region (e.g., Hezbollah, Houthis) and Israel will have a serious impact on migration and refugee movements in the future.. These crises all started within a relatively short eight-year period. These were not chance events, but events linked to the hostile geopolitical, geoeconomic and security situation in the world.

The trend of security conflicts causing migratory and refugee crises will continue in the next decade and become the new normal (baseline development). A possible worsening of the global geopolitical situation will increase the frequency, magnitude and knock-on effects of regional crises. A future conflict in the Middle East and North Africa (MENA) region would also have sociopolitical and economic consequences resulting in internal displacements, massive people movements across national borders and humanitarian crises, which would affect the EU significantly.

THE SECURITY CRISES IN THE EU NEIGHBOURHOOD WILL HAVE LONG-TERM CONSEQUENCES FOR THE AFFECTED COUNTRIES AND EUROPE.

Past analyses have found that regional wars cause wide-ranging effects, and the human and economic costs span a period of decades.[99] The recent crises have caused humanitarian catastrophes affecting human security and development significantly. Since the wars in Ukraine and Gaza are ongoing their full impact on regional and international security, as well as EU border management, is yet to be seen. The EU, due to its proximity to those conflict zones, will be seriously affected. The full scale of the sociopolitical and economic consequences of the wars in Ukraine and Gaza, and their impact on the EU, should be carefully assessed in the future.
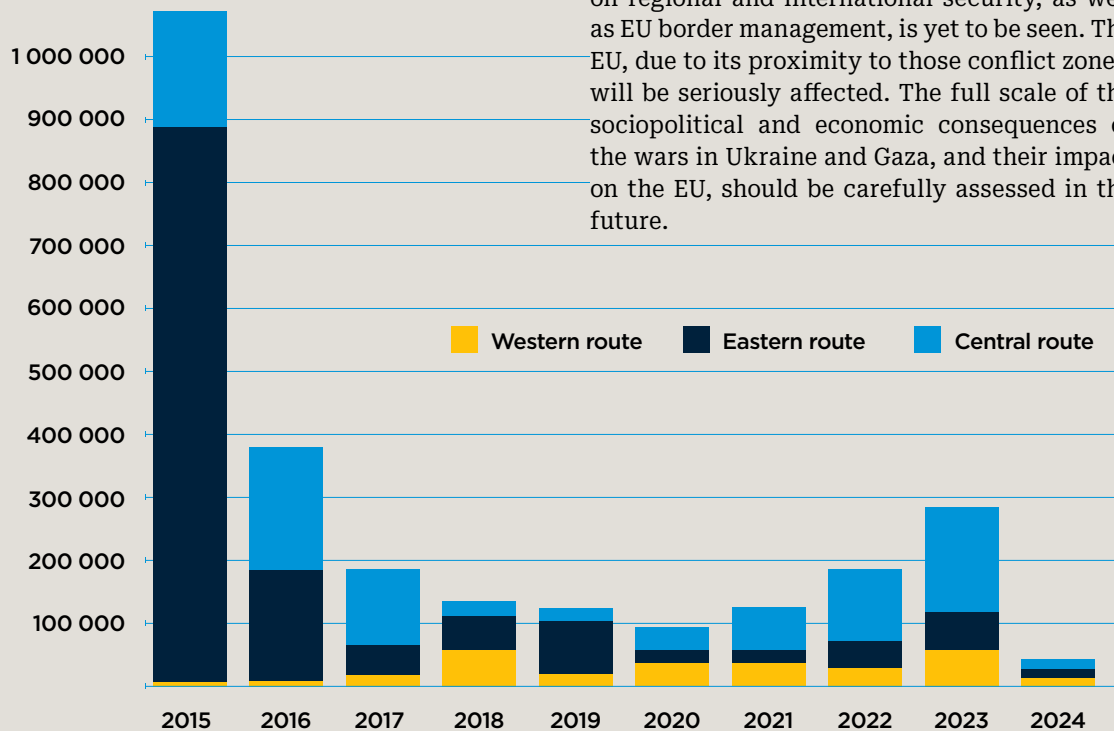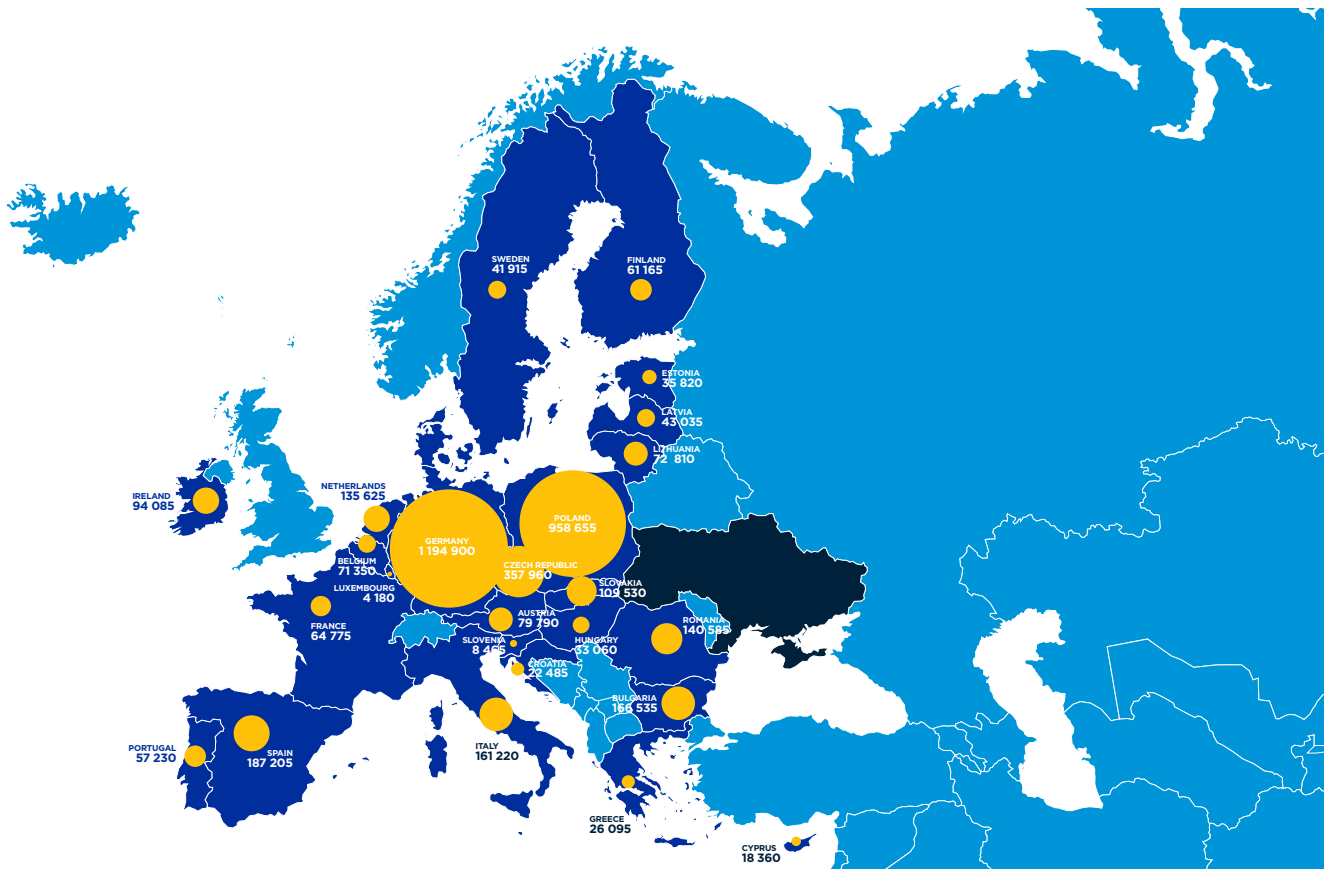

Figure 10 The 2015 migration crisis and the main routes of migration across the Mediterranean to the EU over the period 2015-2024[100]. Source: Frontex and Spanish Ministry of Interior.

Figure 11 *Ukrainian refugees that benefit from temporary protection in the EU. Source: Frontex and Spanish Ministry of Interior.*[101]
Note: *The main EU countries that host Ukrainian nationals are Germany (1 194 900), Poland (958 655) and Czechia (357 960).*

THE TOP 20 SOURCE COUNTRIES FOR IRREGULAR MIGRATION, AND THE KEY MIGRATORY ROUTES TO THE EU, WILL LIKELY REMAIN THE SAME IN THE NEXT DECADE.

Previous Frontex analyses have found that the composition of the top 20 nationalities has remained broadly unchanged in recent years with only year-on-year fluctuations in the ranking of the nationalities detected at the EU's external borders. Table 1 shows the African and Asian nationalities that consistently appear on the list.[102] The key migratory routes — that is, the Eastern, Central and Western Mediterranean routes and the Western African route — will likely remain the same too. The organisation of perilous sea-crossings on the Mediterranean and Western African routes will continue to be the main cause of migrant deaths at sea.

Ruthless people smugglers will be using old and unseaworthy vessels to increase their illicit profits while disregarding the risks for migrants. In particular, the use of cargo vessels and fishing trawlers will be endangering the lives of hundreds of migrants each time. The smugglers will also be making selective or opportunistic use of different types of vessels in certain geographical areas (e.g., sailing boats, speedboats, cayucos) as well as resorting to swarming tactics using inflatable boats to reduce the operating costs of their smuggling business and frustrate operational responses. Inflatable boats will be used extensively whenever there is a need to accommodate an increasing demand for facilitation services, including massive flows of migrants by sea.

1 ›	**SYRIA**
2 ›	**GUINEA**
3 ›	**UNSPECIFIED SUB-SAHARAN NATIONALS**
4 ›	**CÔTE D'IVOIRE**
5 ›	**TUNISIA**
6 ›	**AFGHANISTAN**
7 ›	**MOROCCO**
8 ›	**BANGLADESH**
9 ›	**EGYPT**
10 ›	**TÜRKIYE**
11 ›	**PAKISTAN**
12 ›	**SENEGAL**
13 ›	**BURKINA FASO**
14 ›	**MALI**
15 ›	**SUDAN**
16 ›	**ALGERIA**
17 ›	**CAMEROON**
18 ›	**PALESTINE^**
19 ›	**GAMBIA**
20 ›	**ERITREA**

^ This designation shall not be construed as recognition of a State of Palestine and is without prejudice to the individual positions of the Member States on this issue.

Table 1   *Top 20 nationalities of migrants detected at the EU's external borders. Source: Frontex.*

DUE TO THE GEOPOLITICAL CONFLICT AND THE ONGOING WAR IN UKRAINE, THERE WILL BE A GREATER LIKELIHOOD OF IRREGULAR MIGRATION THROUGH THE EASTERN BORDERS OF THE EU COMPARED WITH THE PAST.

European IBM will face challenges due to Russia's hostile position and activities towards EU Member States, Ukraine and Moldova. Russia and Belarus will continue and possibly expand their hybrid operations. The instrumentalisation of migration by Belarus in 2021 set a precedent, proving the capability of hostile third countries to engage in this type of hybrid interference. So, Russia and Belarus could create artificial migration routes in the future in an attempt to destabilise specific EU Member States and the EU as a whole. Russian activities in the Middle East, Africa and Asia could also be part of such hybrid operations. The continuation of the war in Ukraine or a possible NATO-Russia war will have a major impact on the EU's eastern borders causing, among other things, massive population movements and humanitarian crises.

THE HYBRID OPERATIONS OF RUSSIA AND BELARUS WILL LIKELY COMPRISE THE FOLLOWING (NON-EXHAUSTIVE LIST):

▸ instrumentalising migration against the EU (e.g., organising movements of economic migrants, vulnerable individuals and groups);

▸ using sophisticated technological means (e.g., drones with thermal cameras/night vision, GPS jamming) to facilitate people smuggling or other criminal activities at the external borders; staging provocations in certain land border areas;

▸ spreading propaganda and mis/ disinformation through social network platforms and political messages to break up EU unity and responses; undermining EU foreign policy and support for Ukraine;

▸ increasing pro-Russian support and social tensions in EU Member States;

▸ organising criminal activities at the external borders of the EU (e.g., weapons smuggling, drug smuggling) to harm its external and internal security;

▸ launching cyberattacks and physical attacks on European critical infrastructure (incl. border infrastructure).

THE GEOPOLITICAL CONFLICT WILL INCREASE THE SOCIOPOLITICAL AND ECONOMIC INSTABILITY IN AFRICAN COUNTRIES.

Geopolitical conflict and geoeconomic competition will grow as a result of declining European and US influence in sub-Saharan Africa and, in parallel, the increasing influence in the region of other countries (i.e., Russia, China, Türkiye, India, Saudi Arabia and United Arab Emirates). Russia has already expanded its influence in Africa more than other actors in recent years by strengthening its ties with countries of north, central and south Africa. Russia will use various ways to promote its interests in the continent (e.g., deployment of mercenaries, propaganda, election interference, support for authoritarian regimes, sales of weapons and energy resources). Through the use of overt and covert means, Russia will influence democratic governance and security in Africa. Authoritarian regimes in Burkina Faso, Mali and Niger will likely become strongholds for the newly created Africa Corps that operates under the control of Russia's Defence Ministry.

EXTERNAL INFLUENCES IN AFRICA WILL EXPLOIT A BROAD RANGE OF SOCIOPOLITICAL AND ECONOMIC GRIEVANCES, INSTABILITY, INSURGENCES, ETHNIC TENSIONS, TERRITORIAL DISPUTES AND GEOPOLITICAL RIVALRIES.

Certain African countries could become particularly vulnerable to influence, interventions and activities of external state and non-state actors. The latter could stir sociopolitical tensions, unrest and civil war, triggering intra-Africa displacements and/or irregular migration flows outside the continent, mainly towards Europe on the Central and Western Mediterranean routes. Hybrid activities could instigate such developments, resulting in notable changes in border and migration policies, migration patterns and trends, and political cooperation between African countries and the EU, impacting the effectiveness of European border and migration management (incl. returns).

BESIDES HOSTILE GEOPOLITICS AND SECURITY CRISES, THE INTERPLAY OF OTHER KEY DRIVERS OF NATIONAL, REGIONAL AND INTERNATIONAL MIGRATION — SUCH AS STRUCTURAL AND SYSTEMIC INEQUALITIES, ECONOMIC CRISES, CLIMATE CHANGE, ENVIRONMENTAL DEGRADATION, RESOURCE SCARCITY AND DEMOGRAPHIC CHANGES — WILL SIGNIFICANTLY AFFECT THE SITUATION IN LOW-INCOME COUNTRIES AND DRIVE MIGRATORY FLOWS TOWARD RICHER COUNTRIES.

Table 2 summarises some of the effects from the perspective of EU border and migration management. As described in the previous chapter, a broad range of socioeconomic hardships (e.g., geoeconomics, economic instability, limited employment and educational opportunities) and systemic inequalities will seriously affect low-income countries. Weak governance and ineffective policies that cannot address the big problems of the world will exacerbate the situation at national, regional and international level. The combined effects of chronic problems and critical events (e.g., security crises, natural disasters) will weigh heavily on migration decisions, eventually forcing millions of people to move within and across borders in search of a better life. Human security concerns[103] will increase in the future reflecting the precarious conditions faced by migrants and refugees. The vulnerabilities and risks for migrants will manifest themselves in various ways (e.g., racism and xenophobia, exploitation of vulnerable groups, sexual/economic exploitation, violence, crime, victimisation, migrant fatalities at sea, legal uncertainties).

GEOPOLITICAL CONFLICT AND SECURITY CRISES	Existing and new security conflicts will cause disproportionate migratory flows or crises. Instrumentalisation of migration by state or non-state actors for geopolitical or other strategic purposes will be more frequent than before. This will have a destabilising effect on the EU's external and internal security. EU border and coast guard authorities will be under considerable pressure to protect the external borders and manage major flows of migrants and refugees.
HUMANITARIAN CRISES	Security conflicts, megatrends or natural disasters will drive major influxes of migrants and refugees in the EU. The capabilities and capacities of EU border and coast guard authorities will be put to a hard test due to operational, logistical and infrastructural challenges. EU border and coast guard authorities will be under considerable pressure to offer humanitarian assistance as well as engage in search-and-rescue operations and save lives at sea.
PERSONS OF INTEREST AND FOREIGN FIGHTERS	Persons of interest and foreign fighters will exploit irregular migration routes, flows and *modi operandi* to enter the EU undetected or pose as economic migrants and refugees. EU border authorities will face security risks and operational challenges (e.g., identification issues) due to such persons infiltrating migratory flows.
CROSS-BORDER SMUGGLING ACTIVITIES	EU border and coast guard authorities will have to counter the growing incidence and scope of smuggling activities at the EU's external borders (e.g., people smuggling, THB, firearms smuggling, drug smuggling, cigarette smuggling, oil smuggling). Criminal networks — both specialised and polycriminal ones — will exploit any border control/ surveillance limitations and legal vulnerabilities to achieve their objectives. State and non-state actors will also exploit such vulnerabilities in the context of hybrid operations.
SOCIOECONOMIC DISPARITIES AND INEQUALITIES	At macro level, socioeconomic disparities and structural inequalities will affect the labour markets and major segments of the populations of low-income countries (e.g., high unemployment, low salaries, poor educational opportunities, wealth inequality). At micro level, these factors will influence individual decisions to migrate through legal or illegal channels to the rich Western countries and emerging economies of the global east and south in search of a better life.
GLOBAL MOBILITY, TRANSPORT AND TECHNOLOGICAL PROGRESS	Increasing mobility across borders, improvements in global transport networks, and broader access to information and communication technologies (e.g., web-based applications, social media platforms) will facilitate people movements between developed and developing countries. Both migrants and people smugglers will be use various communication tools to achieve their goals. Global (bona fide) mobility will be facilitated through legitimate travel and work requirements, visa policies, and improved modes of transport (sea, land, air). To facilitate an action or process, especially one that you would like to happen, means to make it easier or more likely to happen.
CLIMATE CHANGE AND NATURAL DISASTERS	Extreme natural phenomena (e.g., heatwaves, droughts, wildfires, storms, floods) environmental degradation and resource scarcity (e.g., environmental pollution, water and food shortages) will cause or intensify domestic, regional and international migration. These factors will compound the situation in areas of conflict and instability. Natural disasters could trigger humanitarian crises, as well as large and sudden people movements, requiring coordinated efforts and long-term planning for resettlement and integration by the host/destination countries.
DEMOGRAPHIC SHIFTS	Asian and African countries will experience demographic shifts and their populations will grow massively in the future and contribute to international migration. Transit and destination countries that host large numbers of migrants and refugees will experience economic hardships, sociopolitical tensions and rising anti-migrant sentiments in their societies. EU-based diasporas will continue to influence migration decisions and support arriving migrants. Aspiring migrants will mainly rely on family/kinship ties, social networks, financial support and remittances to reach and settle in their preferred destination countries.
PUBLIC HEALTH	Various infectious diseases will pose a constant threat of epidemics and pandemics (e.g., cholera, meningitis, Ebola, measles, yellow fever, monkeypox, Zika, coronaviruses).[104] Low-income countries in Asia and Africa with weak governance and public health systems will be particularly vulnerable. Climate change and environmental degradation, population growth, urbanisation and global mobility will facilitate outbreaks of both known and unknown zoonotic diseases. Intra-regional and international movements of people will spread infectious diseases hindering epidemic and pandemic control efforts.

Table 2   *The interplay of key megatrends and their effects on EU border security and migration.*

RETURNS

The sociopolitical need for the effective management of return processes is evident across the EU. The number of actual migrant returns, tiny in relation to the migratory inflows to Europe, highlights the need to prioritise returns on the political agenda and in operational responses. Inadequate attention to the challenges faced by return actors, inefficient resource allocation, and complex return processes could hinder the development, coordination and implementation of effective return policies and activities resulting in suboptimal outcomes.

ALIGNING POLICIES

Streamlining all phases of the return process and aligning them within the EU and with non-EU partners is critical to meet growing global challenges. While EU legislators discuss the need to introduce new return procedures at the border, the situation calls for a comprehensive and coordinated approach to migration management, including effective cooperation with third countries in return and readmission matters.

The European Council has emphasised the importance of using all relevant EU policies, instruments and tools to achieve measurable results in preventing irregular migration and returning migrants who have exhausted all legal remedies to stay in the EU. This includes mutual recognition of return decisions among Member States, but also leveraging development, trade and visa policies to strengthen cooperation with third countries to facilitate the identification, document issuance and acceptance of their nationals. The new Pact on Migration and Asylum highlights the need for a comprehensive, balanced, tailor-made and mutually beneficial migration partnership with third countries, focusing on return, readmission and reintegration.

The inability to implement harmonised policies for certain categories of migrants who are deemed 'unremovable' entails risks that should be considered by policy makers. The lack of clear and harmonised policies can result in confusion about the procedural frameworks for returning different categories of migrants and inconsistencies in the issuance and implementation of return decisions. This inconsistency allows unscrupulous actors to exploit vulnerable migrants.

To mitigate these risks, the EU aims at developing and implementing policies that strike a balance between protecting the rights of migrants and the effective management of return processes. This comprehensive approach should consider legal frameworks, human rights and cooperation with countries of origin. By addressing these, Member States can work towards a more inclusive and effective national policy, legislation, procedures and processes for the return of migrants.

The development of a legal framework on returns is expected to facilitate the establishment of safe and lawful pathways, as well as the ability to manage legal and orderly migration. Agreement on the Common European Asylum System (CEAS) and the Recast Return Directive could provide a legal basis for expediting the processing of international protection applications and implementing efficient return procedures for larger numbers of returnees. The Recast Return Directive can create a common understanding and legal grounds for optimisation and harmonisation of return processes and procedures, as well as definitions across the EU.

THE ROLE OF FRONTEX

Frontex has intensified its operational and technical support in carrying out effective returns and will continue to do so by offering a number of fully-fledged return services to the Member

States to support them in all stages of the return process. Exchange of information, data and best practices between Member States and Frontex will provide reliable situational awareness on return, enhancing national return systems and processes and facilitating activities in the pre-return stage (e.g., through identification missions). Moreover, the Agency will continue to organise return operations, easing the operational and administrative burden on Member States. The deployment of return specialists also addresses a lack of sufficient resources for various profiles of experts. Through enhanced coordination and partnership with Member States, Frontex has been working to strengthen and consolidate its role as the operational arm of a common EU return system.

Since the inception of the EU Reintegration Programme[105] in 2022, Frontex has been providing valuable support to Member States in terms of post-arrival and post-return assistance to returnees. This successful programme is expected to further expand in the future with the purpose of improving cooperation with third countries. This will establish Frontex as a key player in all phases of the return process.

COOPERATION WITH THIRD COUNTRIES

Cooperation with third countries is crucial for the EU's management of migration, asylum and return. The complex challenges posed by migratory pressure can be better addressed by streamlining the return process and enhancing cooperation between the EU actors and with non-EU partners. This will ensure comprehensive and efficient migration management in the future.

Analysis of statistical data[106] has shown geographical disparities in the effective returns of migrants from the top 20 countries of origin with a disproportionately higher number of returns of nationals of Balkan and Caucasus countries compared with Asian and African countries. Although this can be attributed to several factors (e.g., geographical proximity, cooperation agreements, legal and administra-

tive procedures, return challenges) it is important to address this issue by strengthening partnerships with key Asian and African countries. This could include negotiation of readmission agreements, support for capacity building and infrastructural development, and promotion of return-related dialogue and cooperation.

Since several third countries do not show much interest in improving cooperation on forced returns and returns in general, the EU could encourage cooperation on voluntary returns through special programmes such as an alternative measure that could overcome the limited cooperation or lack of response from those countries. Such programmes should be implemented on the basis of comprehensive policies and support mechanisms to avoid any fraudulent actions and exploitation. In particular, the incentives for voluntary returns and reintegration should be carefully managed to prevent them from becoming pull factors.

The visa code and visa policy should encourage cooperation and compliance with the cooperating countries of origin through visa facilitation agreements. At the same time, restrictions and suspensions (or conditionalities) should be considered when third countries demonstrate a lack of cooperation.

Practical difficulties will remain in terms of migrant identification, documentation and acceptance of returns by third countries. This often involves unidentified or undocumented migrants who are rescued at sea. This will continue to have an impact on effective returns.

EU financial support and cooperation with third countries on returns will be more significant in the coming years due to the establishment of new bilateral, regional and multilateral cooperation frameworks and agreements. Returns will continue to be a critical element of EU migration management. Frontex's return activities will complement other areas of technical cooperation with third countries, such as support in border control and surveillance, capacity building and training.

COMMON MEASURES

It is crucial for the EU to establish consistent and uniform 'sanctions' applied across all Member States for those who abscond or evade return decisions. This will ensure the effectiveness of return processes, while discouraging irregular migration and secondary movements and upholding the rule of law. Furthermore, enhanced cooperation and information sharing between Member States will improve the monitoring and detection of individuals who have disregarded return decisions or have relocated to other countries. Existing mechanisms and databases (e.g., return alerts and entry bans in the Schengen Information System) should be used extensively for the purpose of crosschecking and implementing return decisions.

The detention of migrants across the EU and the different national procedures have been causing sociopolitical tensions. Applying uniform detention periods, or preferably, applying alternative methods of detention can prevent inconsistencies. Any inconsistencies or lack of common policies and alternatives can undermine the effectiveness of returns.

It is essential to use a common system for the registration of people with a higher risk of absconding to ensure return decisions are implemented. The inability to implement return decisions leads to migrants who have been instructed to leave a Member State to move to another Member State as a way to avoid return.

Failure to impose uniform measures on those who abscond or evade return decisions will strain the resources and capacity of Member States. It will require extra efforts and resources to detect, apprehend and process individuals who have disregarded return decisions and/or have relocated to other countries. This will not only place an additional burden on immigration enforcement agencies, hindering their ability to manage migration effectively, but will also give the impression of unfairness and impunity of individuals who disregard return decisions and face no consequences for their actions.

IMPROVING RETURN SYSTEMS, DIGITALISATION AND INTEROPERABILITY.

Digitalisation and technological applications will help improve return systems and processes. Mechanisms for collecting return data, central repositories of information and online communication tools for return cases will enhance efficiency and provide more accurate statistics. The performance of national return systems will benefit from digital transformation significantly.

Frontex will continue to work on common standards and requirements for return case management systems within and outside the EU, promoting the optimisation of return processes (e.g., RECAMAS reference model). The importance of digitalisation is undeniable, but the deployment of diverse technologies by national return case management systems will continue to pose harmonisation, integration and interoperability challenges.

More specifically, the tracking and monitoring of migrant returns presents significant challenges due to the lack of a common repository for EU return cases. This serious capability gap hinders the enforcement of return decisions. Furthermore, the lack of a fully digitalised return case management system will continue to create opportunities for migrants to evade return procedures due to missing entries and/or links to other relevant systems (e.g., the asylum case management system).

To address these challenges, it is crucial to ensure the interoperability of different national and large-scale IT systems throughout all phases of migration (i.e., from initial entry to final exit of each migrant). The development of interoperable systems over the medium and long term will offer several distinct advantages. It will improve the tracking and monitoring of return decisions and actual returns as well as enhance coordination and information sharing among Member States. The latter will make it easier to enforce return decisions, while ensuring compliance and facilitating the identification of migrants though appropriate and timely exchanges of information and documentation between Member States. Lastly, it will help reduce the number of secondary movements of migrants within the EU.

Overcoming the challenges of tracking and monitoring the return of migrants will require harmonised policies, digitalisation and interoperability of EU return systems as well as improved coordination among Member States. By addressing these issues, the EU will improve the effectiveness of return processes, protect the human rights of migrants, and ensure the integrity of migration and asylum systems.

In the next decade, it will be crucial to enhance the efficacy of the internal and external aspects of EU returns. In a turbulent environment characterised by increasing international migratory flows, it will be essential to make significant and sustainable improvements to the Common EU Return System with the purpose of substantially increasing the number of effective returns.

4.   Cross-border crime

Cross-border crime poses a serious threat to security at the EU's external borders and to the Union as a whole. The estimation of the future magnitude and impact of cross-border criminal activity is challenging especially due to the 'dark figure of crime'. Europol stated in its Serious and Organized Crime Threat Assessment that over 80% of reported criminal networks are involved in the drug trade, organised property crime, excise fraud, THB or migrant smuggling. Most of these crimes constitute cross-border crimes.

MIGRANT SMUGGLING

In the landscape of global migration, migrant smuggling has long been a contentious issue, having had a significant impact on both the external borders and the internal security of the European Union. Typically, over 90% of irregular migrants who reach the EU use smugglers for parts or all of their journey.

Besides geopolitical shifts and socioeconomic disparities climate change will trigger displacements and could create new opportunities for smugglers to exploit vulnerable populations. With persistent instability and conflict certain regions may become hotspots for illicit migration, with smugglers capitalising on existing vulnerabilities. The humanitarian dimensions of migrant smuggling, with victims fleeing floods, drought or starvation, must be better understood and require a coordinated international response to address both the root causes and consequences.

Recent years have witnessed a worrying trend in the instrumentalisation of migration for the benefit of state actors. The dehumanisation of migrants as a weapon for political and strategic gains has been a characteristic of the increasingly hybrid nature of the challenges faced at the external borders.

Despite anticipated labour migration of skilled workers, economic inequalities could drive individuals to seek better prospects, fuelling smuggling services as a means of circumventing otherwise restrictive immigration policies.

Advancements in technology are likely to play a pivotal role in reshaping future migrant-smuggling activities. With the proliferation of encrypted communication channels, blockchain-based transactions and sophisticated surveillance systems, smugglers may be better able to evade detection and enhance operational efficiency. This could lead to the emergence of even more clandestine networks, making it increasingly difficult for law enforcement agencies to track and disrupt their activities. Criminal networks collaborate with other criminal networks when business needs arise on occasional or more permanent bases. Logistics services and the transport of irregular migrants are commonly outsourced activities. Criminal networks also offer additional services to irregular migrants, such as fraudulent documents, accommodation en route and support for legalising their stay and accessing the regular labour market.

An even more worrying trend is the escalation of violence and reckless behaviour among criminal networks. Irregular migrants, law enforcement officers and criminal rivals have been subjected to such violence, which has be observed in many regions, both at the external borders and within the EU. Addressing this threat will become more dangerous for law enforcement specialists, as criminals are less and less hesitant about using it.

Migrant-smuggling activities are rooted both in third countries, where smugglers try to attract migrants and offer their services, and in the EU, where criminal networks facilitate secondary/internal movements and integrate migrants into national and EU financial schemes. The EU Action Plan for Migrant Smuggling 2021-2025 establishes dedicated and tailor-made anti-smuggling operational partnerships with third countries or regions along migratory routes towards the EU, in order to strengthen efforts to prevent these criminal acts before they reach EU territory. Although the application and success of these partnerships rely significantly on the level of engagement of third countries, strengthened cooperation with countries of origin and transit is crucial to suppressing these threats.

The future of migrant smuggling is shaped by a combination of technological, environmental and socioeconomic factors. It is imperative that we remain proactive in our efforts to prevent and combat illicit migration as a business model and uphold the rights of all individuals. Only through collective action and solidarity can we strive towards a future where migration is based on justice and respect for human rights.

In response to these evolving challenges, policymakers and stakeholders must adopt a multifaceted approach that combines targeted enforcement measures with the latest technologies and comprehensive strategies for addressing the underlying drivers of migration. This entails mutual understanding and solidarity in managing migration, enhancing international cooperation and information-sharing mechanisms to disrupt smuggling networks, while also investing in measures aimed at promoting socioeconomic development and safeguarding the rights of migrants.

SMUGGLING OF ILLICIT AND EXCISE GOODS CONSTITUTES A SERIOUS THREAT TO THE INTERNAL SECURITY OF THE EU

Ninety percent of intercontinental trade uses maritime routes, thus a wide array of *modi operandi* used by organised criminal groups that smuggle illicit goods take place in the maritime domain. Containerised transportation is the main area of the maritime trade supply exploited in transnational criminal activities. 500 million containers are shipped worldwide every year, and by 2050 this number might have tripled. Less than 2% of these containers are inspected, and the insignificant decline in the number of reported incidents during the pandemic indicates that crime groups can quickly adapt to any conditions.

This already challenging environment will see further complexity in the coming years. The recent blockage of the Suez Canal, piracy and targeted attacks in the Gulf of Aden in response to the situation in Israel, and the drought in the Panama Canal have seriously disrupted supply chains and global trade.

The establishment of alternative transport routes will therefore have to be prioritised. New transport routes like China's Belt & Road Initiative and the Arctic Route, the use of autonomous vessels or AI in all port management-related activities give us a preview of the challenges to address at the EU's external maritime borders, where flows of illicit goods will be blended into a growing seaborne trade. At a smaller scale we will see growth in air freight and small parcel deliveries as e-commerce further develops.

Efficient non-intrusive inspections of containerised freight and small parcel shipments will be critical to trade and society. Freight containers are potential means for smuggling (e.g. tobacco), drug trafficking, transporting mis-declared goods and dangerous illicit substances, including explosives, nuclear material, chemical and biological warfare agents and radioactively contaminated goods, as well as for illegal immigration. Mass transports through seaports as well as rail and road transports are at risk. Innovative detection technologies, like improved X-rays, photofission and sniffing might contribute to greater effectiveness and efficiency of controls, but they will have trouble keeping up with the increased flows of goods.

Excise smuggling, particularly of tobacco products, presents a significant challenge to the European Union, with implications spanning economic, health and law enforcement domains.

Firstly, attractive profit margins drive the illicit trade in tobacco products. Substantial price differentials due to high excise taxes in many EU countries incentivise criminal organisations to engage in cigarette smuggling. Advancements in technology and globalisation are likely to exacerbate the problem. E-commerce and digital developments already facilitate illicit trade through online platforms and discreet transactions across borders. Additionally, the proliferation of global supply chains and the ease of transportation increase the opportunities for smuggling, making detection and interception more challenging for the authorities.

Furthermore, socioeconomic factors such as income disparities and unemployment contribute to the demand for cheaper cigarettes, driving individuals to seek illicit tobacco products. This demand-side pressure will fuel the persistence of excise smuggling.

This trade has a significant financial impact on Member States' budgets due to the substantial loss of excise revenue it entails. A study carried out by the EUIPO and the OECD estimated that counterfeit and pirated goods worth EUR 119 billion were imported into the EU pre pandemic, representing almost 6% of EU imports. China and Russia are the main countries of origin for counterfeit cigarettes smuggled into the EU, which not only is a destination for illicit tobacco products but also serves as a transit to large markets such as the United Kingdom.

Illicit tobacco products are trafficked via both land and sea borders in containers passing through major international ports and free economic zones. Following their arrival at seaports, shipments of illicit tobacco products are transported to their final destinations in lorries. Although most contraband crossing the external borders clandestinely comes through the major ports, other ways of smuggling goods by sea and land are and will be frequently used.

The use of drones and other unmanned craft is already a reality, but a lot of 'criminal potential' can still be discovered in the use of advanced AI devices. The systems and functionalities used will be adapted and optimised for avoiding law enforcement/border guard controls and measures.

The criminal networks responsible for the import and distribution of smuggled goods in the EU are believed to be based outside the EU. These networks maintain warehouses across the EU, mostly in industrial locations and close to transportation hubs. EU-based criminal networks are responsible for the distribution of imported counterfeit goods. Criminal networks involved in the production of counterfeit items are constantly monitoring consumer preferences and adapting their products to meet changing demands.

Commodities are expected to be increasingly shipped in containerised cargo, and criminal networks will try to smuggle illicit goods and exploit security vulnerabilities linked with the inability to carry out thorough checks of such great volumes of cargo. The digitalisation of criminal markets and the possibility of anonymised deliveries of illicit goods, for instance through small parcel shipments, will increase, making it more challenging for authorities to identify and address the perpetrators.

Finally, the landscape of excise smuggling is poised for significant transformation, particularly in light of evolving attitudes towards drug legalisation and regulation. There has been a growing global trend towards the decriminalisation and even legalisation of certain substances, challenging traditional approaches to drug control and enforcement, particularly cannabis. As more countries move towards legalising cannabis for medicinal and recreational purposes, the illicit market for this substance is likely to diminish. However, this does not necessarily spell the end of smuggling.

On one hand, legalising certain substances can help undermine the profitability of smuggling networks by providing consumers with access to safer, regulated alternatives. On the other hand, the legalisation of drugs may also create loopholes and opportunities, like disparities in pricing, taxation or the potency of active ingredients, that smugglers can exploit.

From an IBM perspective, it therefore requires constant observation of the current development, the evaluation of the effects and possible reactions of the criminal groups in order to find an appropriate operative response in coordination and cooperation with all security partners.

Strengthening international cooperation and intelligence-sharing among EU Member States and with third countries is essential to disrupt transnational criminal networks involved in excise smuggling. This includes enhancing collaboration with law enforcement agencies, customs authorities and Interpol to coordinate efforts and exchange best practices. The authority to confiscate profits, assets and means of committing crime is an important instrument.

Additionally, investing in technological solutions such as advanced surveillance systems, tracking and tracing technologies and data analytics can bolster enforcement capabilities and enhance the ability to identify illicit supply chains. Moreover, raising public awareness about the risks associated with consuming illicit tobacco products and the broader societal impacts of excise smuggling can help curb demand and undermine the profitability of illicit trade.

FIREARMS SMUGGLING

Firearms smuggling is another distinctive business for organised crime groups and one of the most dangerous transnational crimes. The majority of criminal networks (around 60%) employ violence as part of their criminal businesses, and so the demand for weapons will continue to require coherent counteraction from law enforcement and border guard authorities.

Conflict areas around the globe have been proven as countries of origin for weapons which are afterwards used either within the EU for illicit activities (organised crime and terrorism) or outside in other war zones. The conflict in Ukraine has caused destabilisation, not only within the country but also across the broader region. As the conflict persists, the proliferation of arms from Ukraine, including surplus military weapons and ammunition, presents a pressing concern for neighbouring countries and the European Union as a whole. The fluid nature of conflict zones fosters arms trafficking and armed groups. The proliferation of firearms, explosives and ammunition is likely to continue and intensify due to the war in Ukraine, generating a long-lasting effect similar to other post-conflict zones.

The current moderate level of detection of smuggled weaponry from Ukraine is a significant success of the enhanced efforts of the Ukrainian authorities to address proliferation and trafficking of weapons including with targeted checks at the EU's external borders.

The future of smuggling such weapons will strongly depend on the persistence of armed conflicts and the security situation, the local availability and demand for such equipment and control measures at the borders. Moreover, the evolving nature of conflicts and geopolitical dynamics in neighbouring regions amplifies the risks of weapons proliferation. Today's conflicts serve as both catalysts and conduits for the illicit trade in arms, presenting complex challenges. Instability and armed conflicts in North Africa, the Middle East, and the Western Balkans create fertile ground for the illicit arms trade, as surplus weapons from conflict zones find their way into the hands of criminal syndicates and extremist groups operating within the EU. Socioeconomic disparities, widening division of societies, radicalisation and extremism generate motivation for individuals to arm up.

The destabilising effects of an influx of arms pose significant challenges to regional security and exacerbate existing tensions within EU Member States fuelling violent crime, terrorism and organised crime. An unrestricted flow of arms not only undermines public safety but also erodes trust in law enforcement and threatens the social fabric of communities.

The emergence of new technologies and illicit markets complicates efforts to combat weapons smuggling. The proliferation of digital platforms and encrypted communications enables traffickers to conduct transactions anonymously, making it increasingly difficult for law enforcement agencies to track and disrupt illicit arms networks. Another dimension of technological development is the advent of 3D printing and CAD technology, raising concerns about the production of untraceable homemade firearms. For such weapons only hard-to-detect essential parts of weaponry or some necessary tools will need to be smuggled. Such items may be mixed in with the flow of regular goods or smuggled in the flow of travellers.

In response to this escalating threat, a comprehensive and multi-pronged strategy is imperative. Strengthening border-control capacities, enhancing intelligence-sharing mechanisms and investing in advanced detection technologies will be essential. Furthermore, raising awareness about the human cost of weapons smuggling and its impact on communities is vital to mobilise support for collective action and foster a culture of accountability and responsibility. Improving international coordination and cooperation among EU Member States and with external partners is crucial to address the transnational nature of weapons smuggling.

IMPACT ON EUROPEAN IBM

DIVERSITY IN CROSS-BORDER CRIMINAL ACTIVITIES IS UNDERPINNED BY A LOW-RISK, HIGH-PROFIT BUSINESS MODEL AND THE FORGING OF TIES BETWEEN CRIMINAL GROUPS IN THIRD COUNTRIES AND IN THE EU.

Criminals on both sides of the border work together to optimise their activities in the EU criminal market by exploiting opportunities in third countries as well as in EU Member States and on the external borders (vulnerabilities include low border/law enforcement capacity, lack of infrastructure and adequate technological equipment, expertise or training, etc.). There is no indication that these criminal activities will decrease in the future. Instead, they are likely to change format and use new methods and *modi operandi* making use of modern technologies.

Across the EU, measures to accurately and consistently monitor the movement of passengers/goods into/through the EU in conjunction with intelligence-led activities (i.e., risk profiling) will need to be enhanced. Interoperability between existing and future systems of EU law enforcement and border control will play a crucial role in increased situational awareness and forecasting and will allow for the enhanced use of existing resources. Cooperation with neighbouring, transit and source countries will become even more important for preventing cross-border crime.

There is a rising perception that crime is prospering and continually developing. Operational actions have not stemmed the flow of illegal activities as criminogenic factors have not been (and potentially cannot be) addressed on a scale that would reduce cross-border criminal activities on the EU's external borders.

Some criminal activities such as smuggling of excise goods and environmental crime are still largely treated with low or even administrative penalties, permitting criminal groups to keep their profits.

Intensive cooperation between all security authorities in the EU, interinstitutional cooperation, information exchange and coordinated operational response are essential components of crime control and IBM must create the conditions for this.

MODERN TECHNOLOGY AND ADVANCED TECHNIQUES WILL BE INCREASINGLY INCORPORATED INTO CRIMINAL ACTIVITIES; NEW, HIGHLY SOPHISTICATED *MODI OPERANDI* ARE LIKELY TO EMERGE.

The EU will remain an important market for illicit goods and, provided demand for some of them (such as narcotics) persists, criminal networks will continue to adjust their strategies to meet it. The use of drones for smuggling across borders, digital devices for guiding the illegal crossings and crypto currency for untraceable payments are symptomatic of an enhanced use of modern technology in cross-border crime, which will make *modi operandi* increasingly sophisticated and difficult to detect.

A world with global markets and massive flows of goods will increase challenges for logistics, border guarding and customs. These should be equipped with the necessary legal authority and new technologies, including artificial intelligence, to effectively counter the criminal threat.

THE DETERIORATING SECURITY SITUATION IN THE VICINITY OF THE EU'S EXTERNAL BORDERS IS EXPECTED TO HINDER EU AND MS EFFORTS TO PREVENT CROSS-BORDER CRIME.

The deterioration of factors which affect the security situation in neighbouring countries such as Belarus and Ukraine, as well as the political situation in third countries which are either source, departure or transit countries for cross-border crime, is expected to hinder EU and Member State efforts to reduce the threat at the EU's external borders. The Frontex will be under more pressure to combat cross-border crime, and the lack of effective cooperation with countries beyond our external borders would be detrimental.

ACROSS THE EU, ENHANCED MEASURES TO ACCURATELY AND CONSISTENTLY MONITOR THE MOVEMENT OF PASSENGERS/GOODS INTO/THROUGH THE EU IN CONJUNCTION WITH INTELLIGENCE-LED ACTIVITIES (I.E., BASED ON RISK PROFILING), WILL NEED TO BE STRENGTHENED.[44]

Interoperability between existing and future systems in the toolbox of EU law enforcement and border authorities will be crucial for situational awareness and forecasting activities. Such interoperability will allow for an enhanced use of existing resources. It is anticipated that cross-border crime is likely to rise in the future, which will have a substantial impact on the EU's external borders and internal security. The operational response at the borders necessitates coordinated efforts from all relevant agencies (border and coast guard, law enforcement, customs).

The digitalisation of cross-border crime *modi operandi* and use of sophisticated technologies require the deterrence capacities of the border authorities to adapt and modernise. European IBM is a vital part of the international security infrastructure that must dissuade illicit operations. Without it, a comprehensive strategy against cross-border crime cannot be realised.

IN THE CONTEXT OF BORDER SECURITY, THE FLOW OF BONA-FIDE TRAVELLERS SHOULD BE A PRIORITY CONCERN BOTH FOR SECURITY AND CONTINGENCY PLANNING.

The EU is in the process of a massive transformation of its regulated borders (e.g., EES, ETIAS, VIS), moving from essentially physical border checks to a new paradigm consisting of a border continuum with different layers. This continuum comprises not only different layers of decision-making but also high integration at the individual traveller (interoperability) and collective layers.

This will give the EU unprecedented capabilities, but will also require proper planning to realise them. Such planning is essential for correctly estimating not only the resources required for business as usual, but also to ensure that a range of scenarios are appropriately addressed to cope with the unusual and unexpected.

Against this background, it is essential for the agencies and Member States running these sys-tems to have a deeper understanding of bona fide travel, its tendencies, driving forces and causes of potential disruptions. In the absence of such information, border management authorities may not be prepared to cope with unexpected events or demands on their resources, ultimately resulting in vulnerabilities and the materialisation of risk at both operational and law enforcement levels.

TRAFFICKING IN HUMAN BEINGS

Trafficking in human beings (THB), especially of people originating in third countries, is a lucrative criminal business which will continue to grow. THB in the EU is dynamic and often follows humanitarian crises around the world. The Russian invasion of Ukraine and the ongoing war caused a major displacement of people within the country as well as towards almost all EU Member States and beyond. Along with sexual exploitation, forced labour remains one of the main risks, especially for long-term displaced people in Ukraine and in the EU. Forcing victims into crime has been on the rise, interlinking trafficking in human beings with other criminal activities, like drug distribution and property crime.

The EU is a key destination region for victims of human trafficking originating in third countries. Instability in Africa and the Middle East, combined with a limited institutional response to supporting vulnerable people in conflict regions, will continue to expose people to human trafficking on journeys in transit and destination countries.

The record number of minors arriving in Europe on the migratory routes significantly increases the risk of child exploitation. As in previous years, the high number of minors will remain one of the main concerns for EU Member States in the coming years, especially in the Central Mediterranean. The lack of legal and safe travel routes exposes irregular migrants to various forms of trafficking and creates opportunities for big profits for criminal networks.
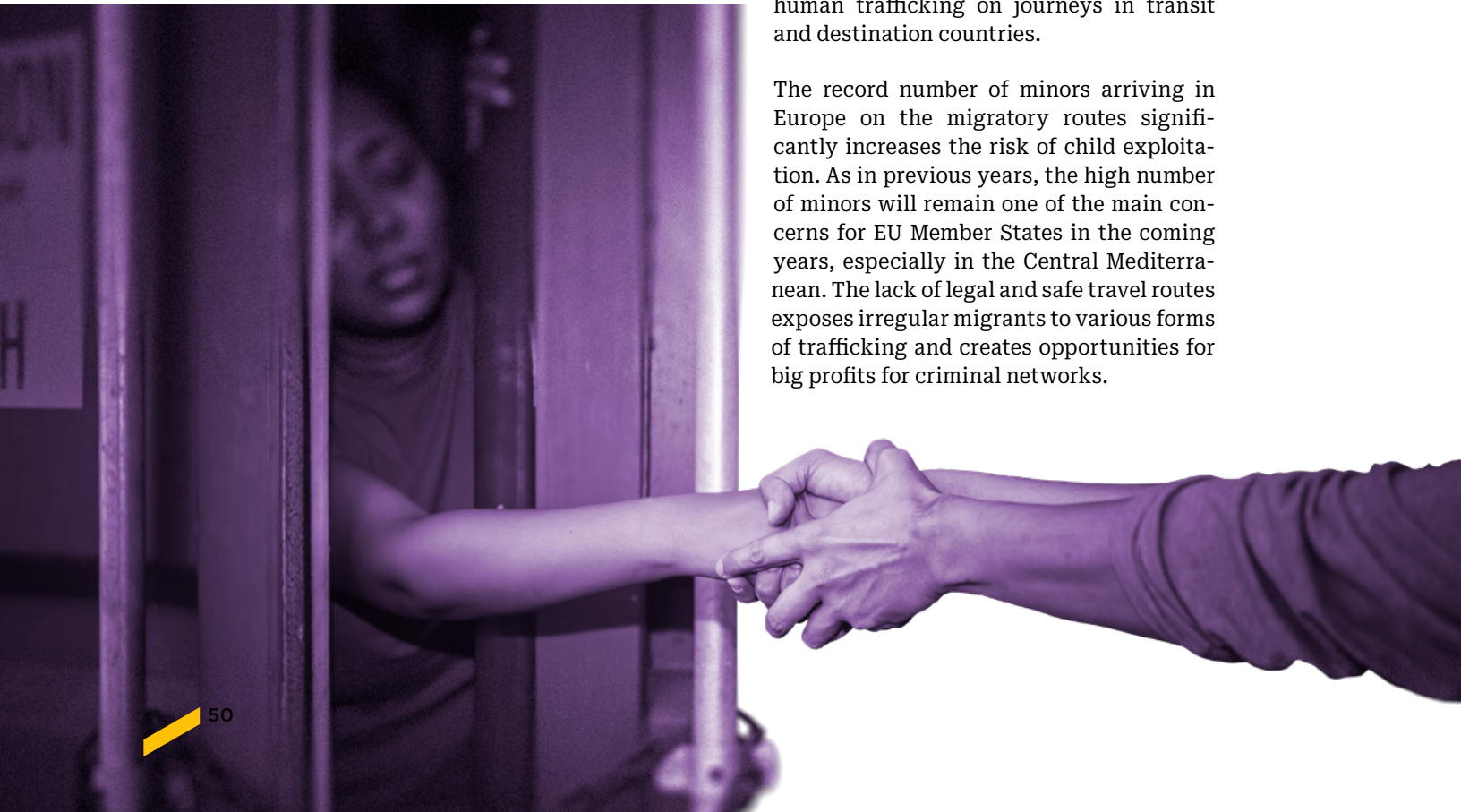
The facilitation of an illegal border-crossing can be an indication that a person is at risk of exploitation, but many victims also enter the EU legally or on forged or fraudulently obtained travel documents. Separation from family members, having their travel documents kept as a deposit, or being granted facilitation services on credit to be paid back once they have arrived at their destination are all indications that smugglers might aim to exploit their customers later on.

According to the most recent EUROSTAT report (Janiuary 2024), 62.8% of registered victims of THB in the EU were women or girls, of which 37% were citizens of Member States. Traffickers are much more likely to be men than women. Sexual exploitation was still the predominant reason for trafficking, but trafficking for forced labour and services reached 41.1% of the total, the highest figure ever recorded. Organ removal and other exploitative purposes, including use for benefit fraud, criminal activities and forced begging, stood at the same level. The figures show that the threats and challenges within a 10-year time horizon will mostly be related to sexual and labour exploitation.

Raising awareness and cooperation between law enforcement agencies plays a crucial role in the fight against trafficking in human beings. A planned update of the risk profiles aims to help border guards at air, land and sea borders identify potential victims of trafficking during first- and second-line checks on entry to the EU and Schengen Associated Countries.

DRUG SMUGGLING

Europe is a large market for illegal drugs. South America, West Asia and North Africa are important source regions, while China and India are important source countries for new psychoactive substances, drug precursors and related chemicals. In the global context, cannabis is the most popular drug in the EU, with cocaine coming in second. Cocaine cultivation and production in Latin America has increased significantly over the past 10 years, indicating that the supply to the EU will persist.

There has been a continuous increase in detections of drug smuggling on the EU borders in recent years. Increased drug smuggling at EU seaports in the North Sea and the Western and Central Mediterranean will remain one of the main criminal threats. The developed transport infrastructure serving the ports on the EU's northern coasts makes them attractive for smuggling drugs for distribution across the whole of Europe. The Belgian and Dutch ports have become the main gateway into the European continent for Latin American cocaine cartels, with the quantity of drugs seized at these seaports rising in recent years. The Western Balkans continue to be a transit region for various other drugs either smuggled through or produced in Europe (e.g., cocaine, hashish and synthetic drugs). For the last several years third countries in Eastern Europe have been considered a regional distribution hub for heroin, cocaine, hashish and synthetic drugs for Eastern Europe and Central Asia.

The changes in Europe's illicit drug market, largely linked to globalisation and new technology, include innovations in drug production, trafficking methods, the establishment of new trafficking routes and the growth of online markets. The seizure of hundreds of tonnes of drugs triggered by the cracking of encrypted communications and thousands of arrests worldwide, showed an alarming picture of the magnitude of drug-related crime in recent years. Drug-trafficking networks have become more aggressive, seizing every opportunity to make a quick profit by offering ever larger quantities.

The growing cocaine supply in recent years, combined with criminals' use of legal business structures, corruption and violence, exposes the European transport and logistic infrastructure to high risks. Land and sea transport to less-secured locations, as well as transporting drugs in contaminated cargo in European countries will be increasingly used. Airports with regular connections with Latin American and African countries, as well as big passenger and cargo transfer hubs, will continue to see frequent seizures of cocaine, heroin and synthetic drugs (amphetamine, methamphetamine, ketamine, fentanyl, etc.) on entry and in transit to other continents (Asia, North America, and Australia). Online trade in drugs and direct deals between European traffickers and criminal networks in drug-producing countries will intensify smuggling activities at EU seaports. Besides the predominant use of containerised drug smuggling, air cargo and courier services will also be preferred methods for direct consignments and anonymised distribution of illicit drugs to customers.

PROPERTY CRIME

Vehicle crime will continue in the future, very likely encompassing electric or hybrid vehicles/vehicle parts. The trafficking of stolen vehicles continues to have a moderate but constant impact on the security of the EU's external borders, with Eastern Europe, the Middle East and North and West Africa remaining the main destinations for vehicles stolen in the EU. Land borders are and will continue to be mostly affected, but there will also be a constant risk

of cars being smuggled in containers from seaports in the North Sea and the Mediterranean. Trafficking of dismantled vehicles concealed in cargo, and online trading in stolen vehicles and vehicle parts is expected to increase, as it gives anonymity and reduces the risk for criminals.

It is expected that criminal groups might try to take advantage of the growing needs of economic sectors like construction, energy supply, transport and agriculture in countries recovering from social and political crises and armed conflicts (e.g., Ukraine).

Even though car manufacturers have added built-in security features to prevent theft or support geolocation after theft, criminals have adapted and use modern technology to their benefit, bypassing the security systems. There have been high levels of detections of stolen vehicles at the EU's external borders in past years, ranging from cars to trucks, buses, agricultural and construction vehicles. Stolen vehicles are either registered using false documentation or have altered security features or are dismantled and sold as spare parts. This trend is expected to grow in the future.

The adoption of electric mobility is changing vehicle markets. It is expected that the volume of electric and hybrid vehicles stolen to be dismantled will increase due to the very high prices of their components. The growing prices of new and used vehicles due to supply issues and pric-

ier components for car manufactures will likely add to the high demand, despite predictions of a forthcoming economic recession.

The different pace of electric vehicle adoption in different countries and future restrictions on the production of internal combustion engines in various EU Member States will also modify the market for used vehicles and parts in the long term, creating new opportunities for organised crime.

OTHER ORGANISED PROPERTY CRIMES SUCH AS TRAFFICKING OF HIGH-VALUE STOLEN PROPERTY (RANGING FROM JEWELLERY TO WORLD HERITAGE PATRIMONY/CULTURAL GOODS/ARCHAEOLOGICAL ARTEFACTS) SHOULD BE CAREFULLY CONSIDERED.

The trafficking across the EU's external borders of high-value stolen property is sometimes challenging to detect due to concealment methods, dissimulated ownership, or a lack of understanding of the process. Such property also constitutes a currency for payment for criminal activities, money laundering or trafficking in stolen goods. In the event of a global recession triggered by Russia's war on Ukraine, a high rate of inflation and rising unemployment in EU Member States and third countries, it can be assumed that property crime, smuggling and receiving stolen goods will increase.

DOCUMENT AND IDENTITY FRAUD

Document and identity fraud is instrumental for a broad range of criminal activities and one of the fastest evolving drivers for various types of cross-border crime. The ability to effectively assess the identity of a document bearer and the validity of their documents is essential to prevent cross-border crime, while ensuring the regular functioning of the EU borders. Within the next decade, the challenges to border manage-

ment posed by identity and document fraud will significantly evolve, mainly driven by changes in dominant security and regulatory paradigms across the globe, *socio-political* developments and technological advancements.

Border control and management systems such as ETIAS, EES and the VIS regulation will soon be fully implemented, boosting information

exchange and security within the European IBM system, but also likely contributing to an increased number of attempted illegal border-crossings at the land and sea borders, as migrants try to evade enhanced controls. It is possible that greater numbers of travellers who do not receive traveller authorisation or a visa under the new systems will resort to document and identity fraud to try to enter the EU. People-smuggling networks will support these irregular migratory movements, increasingly using encrypted communication channels, social media platforms, and online marketplaces to recruit, coordinate and transport victims, while exploiting vulnerabilities in digital identity systems and document verification processes to evade detection by border-control authorities.

To prevent document fraud, manufacturers will keep incorporating sophisticated security features into travel documents. But, in many cases, forgers quickly acquire extensive knowledge of the production methods, security design and weaknesses in the identity chain. On the other hand, increasingly sophisticated security features may lead to vulnerabilities in the detection of unlawful alterations of these documents. These features can be checked with a high degree of efficiency within second- and third-line checks, where the equipment, knowledge and time allow it. However, proper checks may become very challenging during first-line checks.

Countries are now moving towards digital identification systems. As new generations of identity and support documents are increasingly being issued in digital format, and physical credentials such as passports, identity cards and other supportive documents are being scanned and converted into digital copies, digital fraud is becoming more widespread and will pose a growing threat to document security.

As relevant legislation and regulations are adopted, and ethical and legal concerns regarding privacy, data protection and civil liberties are addressed, biometric technologies such as facial recognition, iris scanning and fingerprint analysis will become more prevalent in border control.

Several emerging technologies based on advancements in artificial intelligence (AI), biometrics, blockchain and document verification techniques will likely be implemented to enhance security and detect fraudulent activities more effectively at borders.

Still, it is certain that Organised Criminal Groups (OCGs) will create fake biometric IDs using stolen biometric data or sophisticated spoofing techniques to try to bypass biometric security measures, and will also make use of deep learning technology, to rapidly improve their own ability to circumvent such security measures.

Unforeseeable events and factors can have profound and unpredictable impacts on trends related to fraudulent document use at border crossings. A global travel industry still recovering from a pandemic and European air space and land border sections partially closed on account of the war in Ukraine are current examples. Still, the main push factors in countries of origin and transit for irregular migratory movements to the EU will continue. An unbalanced socioeconomic context, and national-specific pull factors within the EU will continue to explain and motivate certain secondary migratory movements in the area of free movement. The same reasoning applies to phenomena where European BCPs are exploited as platforms for tentative irregular migratory movements to third countries.

Since it is almost certain that the pressure of irregular migration towards the EU will continue, it is also likely that the number of detected document fraudsters on most of the EU's borders will increase over the next decade. Moreover, document fraud will continue to be a key enabler for risks in areas outside the sphere of irregular migration. Such areas include cross-border crime, hybrid threats and terrorism, which can impact a broad spectrum of European IBM components — including the functioning and security of the external borders as well as internal security.

Overall, technological advancements will present challenges for transnational criminal organisations but also opportunities, enabling them to use increasingly sophisticated methods of document fraud to support their illicit activities more efficiently and profitably. Independent of occasional shifts in risk profiles, routes or types of documents exploited, document fraud will continue to have a core role in various *modi operandi* used by irregular migrants — whether smuggled by organised criminal groups or travelling by themselves — to cross the external border and in secondary movements within the EU.

Integrated border management systems will need to remain agile and adaptive in response to evolving threats posed by identity and document fraud. Continuously reviewing and updating European IBM's resilience to this threat will significantly reduce its impact on the EU's security, and on the security and functioning of the external borders, including ensuring the smooth flow of bona fide passengers.

Most vulnerabilities to document fraud are in the domain of operational activities and border permeability. To effectively combat transnational crime enabled by the use of fraudulent documents, governments, international organisations and other relevant stakeholders must collaborate on comprehensive strategies that leverage advanced technologies, intelligence sharing and targeted enforcement measures. It is vital to keep investing in the recruitment, training and deployment of staff specialised in document and identity fraud (including in the electronic components of documents), digital forensics and fundamental rights. Ensuring adequate border-control facilities and equipment at BCPs is also crucial. Ensuring that authorities employ state of the art technology across the entire identity chain is paramount. Enhancing the detection of fraudulent documents at the external borders will also raise the likelihood of identifying, and subsequently protecting, smuggled or trafficked individuals and vulnerable groups.

5.　Terrorism

Violence will remain instrumental in causing terror or having other psychological effects. Primary targets will continue to be strategically chosen to 'channel a message' to a wider audience to influence the broad political environment. Jihadist-inspired terrorism is set to remain a primary threat for the EU. Regardless of the operational success/affiliation of the perpetrator, these attacks will continue to represent a great propaganda boost for terrorist networks.

With growing interconnectivity, the internet will remain the primary operational space for terrorist recruitment, training and propaganda — a condition which sets less sophisticated/high impact 'lone-wolf' attacks as the primary risk for the EU. In this sense, cyberspace has become a primary domain of operations to deny terrorists offensive capabilities through cyberattacks or the exploitation of social media platforms for recruitment and propaganda.

THE SAHEL WILL CONTINUE TO BE THE LOCUS OF TERRORIST VIOLENCE IN THE COMING YEARS.

Africa remains the epicentre of terrorist violence and home to the most dynamic ISIL and Al-Qaeda networks, e.g., ISSP and JNIM respectively. The complex environment is further complicated by the military reconfiguration taking place in the region, especially after the departure of European forces with a consequent reduction of their military engagement. The ensuing security vacuum is likely to be filled by Russian mercenaries and could jeopardise past counterterrorism efforts, further exacerbating the spiral of violence and facilitating jihadists' recruitment efforts. That said, Africa remains very attractive for aspiring recruits — mainly

> Terrorism will continue to be used by state/non-state actors and/or individuals as a tactic to channel specific political, ideological and/or religious messages, or as an attempt to dismantle the current political or socioeconomic order.

from the region — and/or even former FTFs willing to move elsewhere following the territorial defeat of the Caliphate.

Yet, at the moment, the threat posed by each of these affiliates appears to remain local/regional rather than global. However, following intra-jihadist power struggles which have been defining the operating environment in recent years, the departure of international forces and the preponderant role of Russian Private Military Companies (PMCs) seem to have contributed to a confluence of interests of terrorist groups and a localised détente.[107] This can obviously play at different levels, by allowing these groups to better utilise available resources and manpower (previously used to fight each other), consolidate their grip on the territory and start focusing on more long-term objectives, like projecting the threat beyond the region. Overall, the widespread footprint in Africa of Russian PMCs, with the consequent increase of the sphere of influence of the Kremlin on the continent may also materialise in the recruitment of mercenaries to join other theatres where Russia is currently involved, e.g., Ukraine, or conduct acts of violence/sabotage in the EU.

Regardless, the endemic violence in the Sahel is increasing displacement and, therefore, will continue creating fertile ground for criminal/terrorist circles to strengthen their ties through the exploitation of the migratory flow for financial gain and/or recruitment. From an EU perspective, this can offer opportunities to mix with the migratory flow to move to the EU.

This is of particular concern as the Central Mediterranean and Western African routes will likely remain two of the most used migration routes over the coming years.

Turmoil in the Middle East is set to play on different levels in the overall strategy for jihadist recruitment and political/military ambitions in the broader region.

Following sustained counterterrorism operations in the region, which resulted in the killing of major ISIL figures, ISIL remnants maintain a low-level operational posture to recruit and rebuild its operational capability. This comes as no surprise, as internally displaced persons' camps and detention facilities in north-eastern Syria keep offering a population ripe for indoctrination and pose serious policy and security challenges to the international community.

The conflict in Gaza and the general turmoil in the Middle East will play on different levels in the overall strategy for jihadist recruitment and political/military ambitions for the broader jihadist milieu gravitating to the region. This is further complicated by the reduction of Russian military engagement in the region following its war efforts in Ukraine, which could provide militants with more space for manoeuvre e.g., recruitment, regrouping, honing their capabilities, consolidating their grip on territory, and beginning to focus on more long-term objectives. The security situation may also strengthen avenues of cooperation with criminal networks operating in the area, which raises concerns about recruitment/financial opportunities and possible malicious infiltrations. For those wishing to reach Europe, broader migratory routes in the Eastern Mediterranean as well as sustaining onward EU-bound movements by sea towards the Central Mediterranean and/or overland through the Western Balkans will keep offering viable options.

As for Afghanistan, the situation remains complex. Al-Zawahiri's elimination in Kabul in July 2022 confirmed the proximity of the Afghan establishment to al-Qaeda's core and their operational footprint in the country. Whilst the movement might not harbour short-term ambitions to strike internationally — mainly due to lack of leadership and the need to hone their capabilities — it may nevertheless utilise the country to project power, e.g., financial and logistical support, strategic directions. On the other hand, while ISIS-K's primary operational focus seems to remain local/regional, it will likely continue to inspire violent attacks in the West, through lone actors/small cells radicalised online.

THE SITUATION AT THE EASTERN BORDER REMAINS COMPLEX AND RAISES CONCERNS OVER THE UNDETECTED CROSSING OF HIGH-RISK INDIVIDUALS.

The situation on the ground remains complex and may deteriorate with the resumption of military offensives in Ukraine. This is further complicated by the large influx of firearms, ammunition and explosives — which is likely to increase as the conflict drags on — and may incentivise the illicit trade of weapons and explosives, with them fuelling the criminal and/or extremists' ecosystem in Europe.

The volume of people moving to the EU since the beginning of the conflict in Ukraine has raised concerns over the undetected crossing of high-risk individuals e.g., FTFs, their dependents, or subjects linked to PPMCs and the broader far-right milieu mixing among people leaving Ukraine. Hence the need for systematic checks of all persons crossing the external borders through relevant databases and based on biometric data to facilitate identification.

IMPACT ON EUROPEAN IBM

EUROPEAN IBM MECHANISMS WILL PLAY A SIGNIFICANT ROLE IN TACKLING TERRORISM.

While biometric-based database checks can mitigate the risk of known high-risk individuals entering the EU, time constraints, implicit biases, lack of resources and/or training — to name a few issues — can hamper border guards' efforts to deal with the mobility of unknown terrorists. There is a need to reduce implicit biases among frontline border guards to screen the flow for identifiable suspects or risk indicators rather than categorical profiles. This is because the nature of the terrorist threat requires a flexible approach and an understanding of the environment in which it emerges.

In this sense, close cooperation with the authorities responsible for countering terrorist activities and awareness of the level of the terrorist threat are just some elements to be considered into the long-term future. Nevertheless, there is an increased likelihood that technology will be used to better conceal the preparation of terrorist activities or the terrorists themselves, as well as to diversify methods of attack (cyberspace might be more heavily targeted in the future).

WIDESPREAD AVAILABILITY OF INFORMATION, COMMUNICATION TECHNOLOGIES AND SOCIAL MEDIA APPLICATIONS WILL BE A KEY ENABLER OF TERRORISM.

In the long term, the internet, social media, encrypted communication technologies, cyberattacks, artificial intelligence/machine learning and cryptocurrencies will enable the organisation, financing and radicalisation of high-risk individuals. 'Boundaryless' information technologies are impossible to fully monitor, thus enabling terrorist groups to reach out to millions of potential sympathisers around the world and spread their extremist propaganda. IT will be used as a 'force multiplier' for terrorist activities.

CERTAIN INDIVIDUALS WILL BE RADICALSED BY CONFLICTS AND HOSTILE GEOPOLITICS.

Serious geopolitical and socioeconomic problems in third countries, among other push factors, will increase the number of international migrants. Terrorist groups will continue to take advantage of high-volume migratory flows towards Europe to conceal their members and help them cross into the EU undetected. Terrorist groups will also attempt to recruit from the pool of migrants.

TERRORISM WILL CONTINUE TO REPRESENT A MAJOR THREAT FOR THE FORESEEABLE FUTURE.

Timely sharing of information through the creation of an efficient and continually updating data system for border management, migration and law-enforcement purposes will be crucial to improve border checks and operational responses. This will include the operationalisation of the Entry/Exit System (EES), the European Travel Information and Authorisation System (ETIAS), the revised Schengen Information System (SIS), and the revised Visa Information System (VIS), which are to be ultimately integrated with the European Criminal Records Information System — Third Country Nationals (ECRIS-TCN) as well as Interpol's specialised databases (e.g., SLTD, TDAWN).

As for the impact on IBM, one of the main challenges will be to safeguard the free movement of goods and persons within the Union while protecting national security interests. Over the next decade EU border authorities will be increasingly requested to operate in and adapt to a fluid and multidimensional operational environment.

Beyond the political and security challenges discussed above, the Union will have to rethink cross-cutting institutional mandates and jurisdictional responsibility related to the border dimension in order to better hinder the mobility of terrorists and high-risk individuals.

Data on subjects linked to terrorism may be found in battleground information collected by military forces in their theatres of operation. This is particularly relevant for individuals who are not included in EU databases.

Thus, it is necessary to expand the scope of information exchange beyond the EU/Member State law enforcement bodies. Despite advancements in integration, concerns about interoperability persist, and more time is needed to achieve a fully operational integrated information system. Until then, the efficiency of border procedures can be improved if security checks are duly performed against the relevant systems separately.

6. Hybrid threats

HYBRID THREATS REMAIN A RECURRING CHALLENGE TO EUROPEAN SECURITY AND WILL CONTINUE AFFECTING EIBM IN THE FUTURE.

The term hybrid threat refers to actions conducted within an increasing multidimensional operational environment characterised by the following elements: A hostile state or non-state actors who deliberately combine and synchronise ambiguous/covert actions to specifically target systemic vulnerabilities in other states in pursuit of strategic objectives. Those objectives are 'undermining public trust in democratic institutions, deepening unhealthy polarisation both nationally and internationally, challenging the core values of democratic societies, and affecting the decision-making capability of political leaders'.[108] In terms of hybrid attacks on the EU, the aim of these objectives is to destabilise the Union or a Member State and put at risk the essential functions of a Member State[109].

Ambiguity, plausible deniability and hiding the hybrid actors' true intent serve to evade the target's response mechanism and decision-making capability. Yet, recent crises have shown that often these actions are far from covert or ambiguous and — as such — do not allow the perpetrators to maintain plausible deniability — an essential condition to consider the developments hybrid in nature. Nonetheless, all these components will have a challenging effect on border management in the future, especially while aimed at exerting political pressure through the instrumentalisation of migration.

THE UNION AND MEMBER STATES CONTINUE TO DEVELOP THEIR PREPAREDNESS TO PREVENT AND RESPOND TO HYBRID CHALLENGES.

In the past, the complexity of an EU-wide common approach on migration policy and towards 'migration crises', coupled with the exploitation of social concerns over uncontrolled immigration, has left ample space for political/operational manoeuvres by hostile actors, and has often resulted in a reactive approach by the Union and its Member States, which try to maintain a balance between ensuring internal security and their commitment to international law and EU values.

This has often resulted in stricter countermeasures, such as border closures, hasty decisions and approaches, charges of insensitivity to the fundamental rights of migrants in the media, and the overall impression that the EU is an easy target for state actors that use migration as a tool to achieve political and economic objectives.

This has led the EU to develop specific tools in Regulation (EU) 2024/1359 to address situations of crisis and force majeure in the field of migration and asylum and amending Regulation (EU) 2021/1147. This aims to maintain a flexible operational approach by enhancing solidarity and support measures that build upon Regulation (EU) 2024/1351 while ensuring the fair sharing of responsibility, and for temporary specific rules derogating from those set out in Regulations (EU) 2024/1351 and (EU) 2024/1348.[110] Overall, the latest regulation will enhance the EBCG community's capacity to understand not only the 'risks' associated with the instrumentalisation of migration but also the 'opportuni-

ties' to turn the table on the perpetrators. In this respect, it shows that the EU is not condemned to adopt a defensive posture if a coherent response is implemented across the four-tier access control model for integrated border management.

IMPACT ON EUROPEAN IBM

When discussing the impact of hybrid threats on European IBM, it is essential to reflect on the period leading up to the unfolding of previous crises to determine e.g., operational/legal gaps which characterised the Union's approach at the border, aiming to identify and anticipate risks in order to maintain a flexible operational approach.

The crises on the EU's borders with Belarus and Russia in recent years have continued to show that neighbouring countries can instrumentalise migration and use it — often in the shape of egregious violations of human dignity — to increase political and social pressure on the Union.

These objectives were operationally translated by deliberately combined and synchronised ambiguous/covert and at times open actions to target systemic vulnerabilities. Here, the specificities of the operational environment played an essential role in the overall planning and implementation of the single actions during the unfolding phases of the crisis.

At times, the operational environment has requested the perpetrator to utilise its state apparatus' capacities e.g., law enforcement, military, diplomatic, to organise and facilitate the movement of people, and to provide them with logistics, assets and knowledge to challenge the EU's border management capabilities. In some cases — and most worryingly — the hostile third country's strategic ambitions have intersected with criminal groups' economic interests fostering local/regional marriages of convenience. Non-state actors have often served as a state agent by using their capabilities, networks, knowledge of the operational context to

contribute to the pursuit of an overall strategic objective. In this way they contribute to creating the ambiguity/plausible deniability for the state actor to hide its real intent.

Overall, previous crises have shown the means and tools utilised in the period before a crisis can be broken down into three levels: strategic, operational and tactical. Those levels are often simultaneously activated to create confusion, speed up the unfolding phases of the crisis and take opponents by surprise.

Criminal networks have often played an important role at the operational and tactical levels. As for the former, OCGs active in specific regions bordering the EU's external borders have — among other actions — facilitated the movement/transport of people and helped accumulate migrants to create confusion. While at the tactical level, they have often equipped migrants with the necessary know-how (tools) to move towards the targeted border sections and attempt illegal border-crossings. The support may vary according to the operational conditions and — likely — who the migrants are.

HYBRID INTERFERENCE IS NOT LIMITED TO BORDER AREAS BETWEEN NEIGHBOURING STATES; IT CAN HAVE POTENTIALLY GLOBAL REACH AND IMPLICATIONS.

The four-tier access control model for integrated border management remains key when considering the complexities of the overall international context.

Recent years have shown how state actors can take advantage of the global political arena to challenge the international equilibrium through a variety of measures to cause political and socioeconomic instability as well as potentially influence irregular migration and organised crime. This often starts with political or economic interference in third countries aimed at boosting internal instabilities, influencing governmental schemes and even overthrowing gov-

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HYBRID THREATS

ernments, as well as a host of other foreign policy objectives, e.g., projection of power, access to resources and political/economic influence.

The military and political reconfiguration taking place in Africa coupled with the interference of private military and security companies (PMSC) may provide hostile state/non-state actors opportunities for wider hybrid threat campaigns. That said, the endemic violence, which is increasing displacement in the Sahel, may create fertile ground for the exploitation of migratory flow for strategic aims.

Non-state proxies and/or OCGs in Africa may be instrumental in opening multiple operational fronts. The possibility to exploit sectarian, ethnic and religious divisions and grievances among migrants, the capacity to operate in large areas very close to the EU's external borders and a large population to recruit from, certainly offer a powerful tool to conduct a hybrid campaign of significant strategic ramifications.

Such instrumentalisation of migration, coupled with a steadily growing influx of migrants via a combination of routes, may contribute to increasing the pressure on the Member State authorities and attempting to throw them off balance — especially in terms of deployable resources when considering geography and available manpower.

The security paradigm is influenced by several factors, such as the governance systems of countries of origin and transit. This leads to increased complications in addressing hybrid threats. Hostile actors employ the tactic of generating distraction within the EU, as well as fostering polarisation within societies through the dissemination of misinformation and disinformation. This strategy aims to disorientate the EU and facilitate the achievement of the hostile actors' objectives.

In addition, various factors can exert a substantial influence on the development of hybrid threats. These include new technologies that can be employed by hostile entities to directly target physical IT infrastructure or indirectly, by launching communication campaigns or using fake news and propaganda to attack the European Union, greatly impacting integrated border management. Energy dependence and scarce resources are other factors associated with the economy and key infrastructure that a hostile actor may choose to target.

THE EU'S ABILITY TO CONTINUE DEVELOPING ITS FUTURE RESPONSE TO CRISES IS LIKELY TO REMAIN THE DETERMINING FACTOR TO DISSUADE ANY HOSTILE STATE ACTOR FROM RESORTING TO HYBRID THREATS.

The orchestrated use of migration as a tool of coercive diplomacy has — in the past — often triggered responses which varied greatly in time, type and consistency. This — at times — resulted in the affected Member State(s) adopting an individual response, therefore diminishing the opportunities for the formulation of common measures to cope with such crises. This, in turn, created the impression that the EU was a vulnerable target for actors that use migration as a tool for political pressure.

The ability of the EU and its Member States to develop new provisions for a coordinated response to future crises will play a major role in dispelling this belief. The mitigation of future hybrid attacks relies on denying any hybrid actor space for political/operational manoeuvres, but also on ensuring that the perception never arises that a hybrid attack by means of instrumentalised migration will achieve success in terms of tangible concessions to the hybrid actor. This illustrates the need to maintain a proactive approach by implementing a cohesive response across the four-tier access control model for integrated border management.

Regulation (EU) 2024/1359 sets this process into motion by enhancing cooperation at the strategic, operational and tactical levels and

maintaining a flexible operational approach to identifying and anticipating threats.

Additional work has been done with regard to applicable hybrid threats, and practical border-based threat classifications and approaches. This is applicable to all border assets, leveraging on extensive work undertaken by the European Union Agency for Cybersecurity — ENISA (ENISA Threat Landscape Report, ENISA Threat Taxonomy), and Frontex Integrated Risk Analysis Model.

Yet, the geopolitical environment will entail continuing to develop coordinated 'Advance planning' and 'Crisis response planning' capabilities to effectively respond to the emergence of new threats stemming from the dynamic nature of the operational environment.

Strategic communications remain key to unmistakably convey the message that the EU and its Member States will not be intimidated or blackmailed. The EU's ability to harmonise its future response to crises is likely to remain the determining factor to dissuade any hostile state actor from resorting to hybrid threats to exploit the proven political divisiveness of mass immigration in Europe.

MAINTAINING AWARENESS OF THREATS IN THE CYBERSECURITY DOMAIN AND PROMOTING COUNTERMEASURES IS ESSENTIAL TO SAFEGUARDING THE EFFICIENT FUNCTIONING OF THE LARGE-SCALE SYSTEMS USED BY THE EU IN BORDER MANAGEMENT AS WELL AS COUNTERING CROSS-BORDER CRIME.

The annual strategic cybersecurity foresight exercise(s) conducted by ENISA[111] identified 10 top cybersecurity threats to emerge by 2030[112]. Unsurprisingly, both the 2023 and the 2024 exercises indicated the rise of advanced hybrid threats. Physical or offline attacks are evolving and often combined with cyberattacks due to the increase of smart devices, cloud usage, online identities and social platforms.

Looking into the future, hybrid threats will grow more advanced, with notable methods including unauthorised access, social engineering, abuse of personal data, remote command execution and malicious activities. Most hybrid attacks will be perpetrated by state-sponsored actors, hackers-for-hire and cyber criminals, whereas the impact of such attacks is mostly expected to be damage caused by privacy breaches, outages, failures and malfunctions. These attacks may also target the large-scale systems used in border management causing their malfunction, or even worse, scrambling the data stored. Forthcoming technological systems such as the Entry/Exit system or ETIAS might be subject to cyberattacks in order to facilitate irregular migration, cause erroneous decisions or tamper with the blacklists at the border.

Cybersecurity in the European Union is of paramount important for border security. In this context, increasing the awareness of future threats and promoting countermeasures in the area of cybersecurity amongst EU Member States and stakeholders is essential.
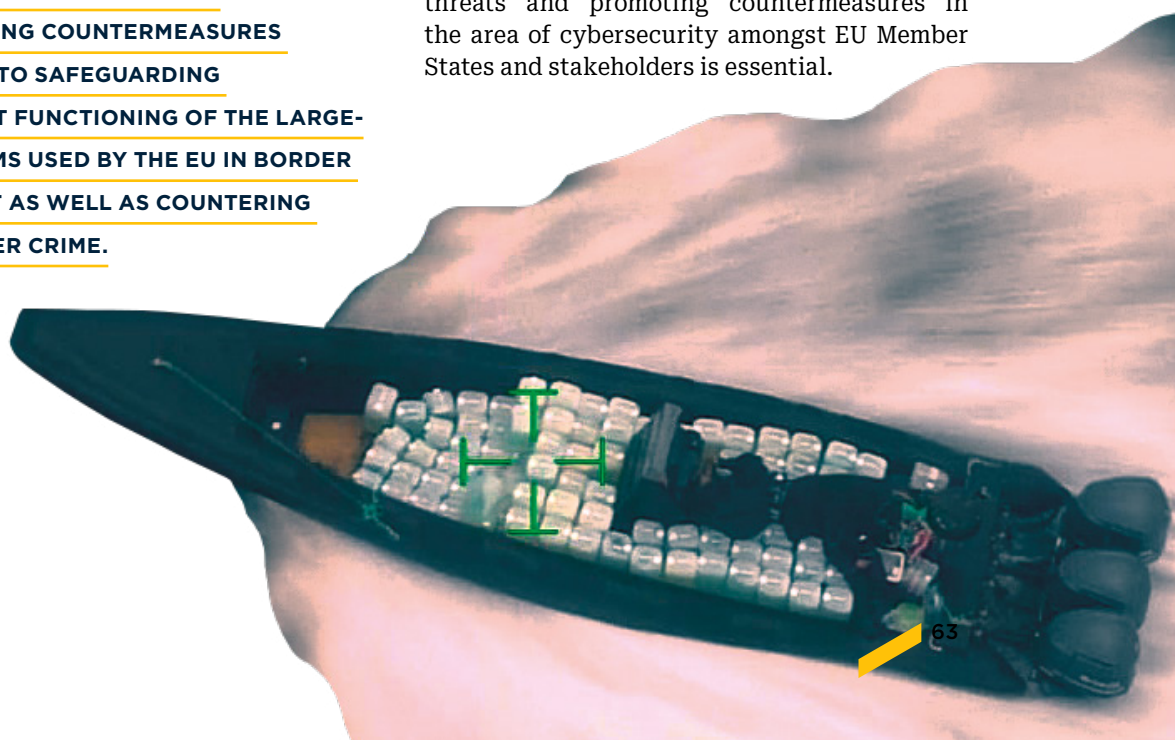
7.   Future scenarios

7.1. BEST-CASE SCENARIO

The world has been experiencing several human-induced crises in recent years mainly due to the hostile geopolitics and intense antagonism between the great powers, middle powers and other revisionist states. Human activities have also been destabilising planetary systems and intensifying natural hazards and disasters. Considering the posture and actions of the key geopolitical actors and their alliances, one wonders: do all roads inevitably lead to conflict?

A MAJOR PEACEFUL SHIFT HAS TAKEN PLACE OVER THIS DECADE SINCE 2024.

Recognising that a descent into chaos has no limits and no winners, the polemic atmosphere has given way to major positive changes in the international environment. The overly strained international relations led the community of nations to engage in a meaningful dialogue and recast the state of global affairs on a new basis. Instead of a zero-sum, lose-lose game, enlightened leadership has steered humanity on a new course.

THE NEW VISION OF HUMANITY IS ARTICULATED AND AGREED UPON AT THE UNITED NATIONS, CONFIRMING THE OVERARCHING NEED FOR HUMANITY TO WORK TOGETHER AND PAVE THE WAY TOWARDS A FUTURE OF PEACEFUL CO-EXISTENCE AND COOPERATION.

All countries focus on civilising international relations and foreign policies. They reiterate their commitment to respecting each other and resolving any differences through dialogue, meaningful cooperation and arbitration.

THE LEVELS OF TRUST AND COOPERATION BETWEEN THE GREAT POWERS, DEVELOPED AND DEVELOPING COUNTRIES ARE ENHANCED THROUGH POSITIVE DIPLOMACY AND POLITICAL NEGOTIATIONS.

New initiatives and cooperation agreements between the USA, the EU, Russia, China as well as Middle Eastern, African and Latin American countries, pave the way towards a better future for all. There is a grand strategy to address all aspects of societal injustices and inequalities around the world. The interests of powerful political and economic elites and other free-market forces are balanced by far-reaching initiatives (e.g., global taxation system) that focus on social responsibility, socioeconomic development and justice for all. Authoritarian and revisionist interests are balanced through win-win solutions that provide significant incentives, such as socioeconomic development and equitable participation in the new world order. Peaceful multipolarity as a way to balance power asymmetries, multilateralism, respect for international law and order, and a shared understanding of the need to act together to preserve the global public goods and resolve the big problems of the world, create a broad framework for constructive cooperation.

THE INTERNATIONAL COMMUNITY MAKES A GENUINE ATTEMPT TO MOVE AWAY FROM THE ANARCHIC STATE OF AFFAIRS.

The idea is to put an end to hostile geopolitics and mitigate the causes and effects of various security problems around the world. Major conflicts (e.g., war in Ukraine, war in Gaza) and trade wars stop. Economic crises are averted. The international order is restored through diplomatic negotiations. Diplomacy takes over focusing on the biggest problems between states and taking steps to mend their relations. A prudent balancing of extreme political positions (e.g., populist vs globalist, democratic vs authoritarian, status quo vs revisionist) supports cooperation at the international level. Scientific and technological advances support the new vision.

THE STRENGTHENING OF GLOBAL GOVERNANCE SYSTEMS AND STRUCTURES ENABLES THE IMPLEMENTATION OF PROGRAMMES AND THE ACHIEVEMENT OF SIGNIFICANT RESULTS FOR THE BENEFIT OF THE INTERNATIONAL COMMUNITY.

The United Nations re-starts work on the 17 sustainable development goals (SDGs) to achieve the goals of its 2030 agenda. The community of nation-states focuses on long-term problem-solving, not short-and medium-term management of problems as before. A grand strategy for humanity is presented that uses the collective means and ways to realise the vision. Addressing the root causes of problems is one of the key imperatives. To this end, international and regional organisations receive strong support that empowers them to work for the benefit of all countries. New organisations are created to address major issues and cooperation gaps (e.g., artificial intelligence). All countries agree on a fairer level of representation in international organisations and fora.

THE EU'S GRAND STRATEGY ACHIEVES SIGNIFICANT RESULTS. THE EU EMERGES AS A LEADING AND TRUSTWORTHY INTERNATIONAL ACTOR DEMONSTRATING GEOPOLITICAL PRAGMATISM, REGULATORY POWER AND ADHERENCE TO NORMATIVE VALUES OF GLOBAL SIGNIFICANCE.

All dimensions of its strategic autonomy are enhanced through the development of positive relationships with all international actors. The relational, regulatory, normative and pragmatic approach of the EU makes a big difference. The EU's economy and industry grows due to the diversification of energy sources and the successful green transition, characterised by significant growth in the use of renewable resources. The EU forges stronger ties with the global east and south that contribute to the improvement of international relations.

IN THIS DECADE, THE EU ALSO DEVELOPS A 'GRAND STRATEGY' IN THE POLICY FIELD OF BORDER MANAGEMENT, ASYLUM AND MIGRATION.

The multiannual strategic policy cycle on European IBM places equal policy attention on the integrity of the borders and respect for human rights. Frontex gets a significant boost in terms of capabilities and capacities, becoming a key partner for national border and coast guard authorities. The national authorities also see major capability improvements due to systematic strategic planning. Other notable changes include the enactment of legislation that supports the grand strategy and the operational framework of European IBM as well as the further development of the Standing Corps as an indispensable resource for EU border management. Privacy and the integrity of personal data are prevailing border control priorities, which are protected by various EU Regulations, e.g., Regulation (EU) 2016/679 General Data Pro-

tection Regulation — GDPR, international conventions, and the UN Charter of Fundamental Rights.

THE SECURITY PARADIGM SEES A PROFOUND SHIFT FROM HOSTILE TO PEACEFUL MULTIPOLARITY MAINLY DUE TO A BETTER UNDERSTANDING BETWEEN THE GREAT POWERS AND THE GENERAL IMPROVEMENT OF INTERNATIONAL RELATIONS.

Any conflicts are short-lived and localised. The intensity of push factors for international migration (e.g., poverty, inequalities, educational and employment opportunities) and the root causes of cross-border crime, terrorism and hybrid threats are significantly reduced. Global initiatives to avoid the worst effects of the climate crisis and the implementation of effective measures for the green transition are on the right track. The occurrence of natural disasters does not cause alarm and the impact of climate change on the most vulnerable societies and international migratory flows is relatively low. Advances in public health research and better pandemic surveillance mitigate the epidemic and pandemic risks from zoonotic viruses and pathogens. Groundbreaking health research contributes to the overall improvement of life for people in both developed and developing countries. Technological advances (e.g., biometrics, artificial intelligence) provide major opportunities and novel applications that change the nature of work, provide new employment opportunities and increase productivity. Targeted United Nations programmes and development aid from the most affluent countries support low-income countries that experience major demographic challenges, helping them address the basic needs of their growing populations. In the EU, new policies address demographic deficits by improving birth rates. Through better education and learning opportunities, developing countries deal with pressing societal issues (e.g., socioeconomic development). In parallel, better youth education helps in countering the

corrupting influence of mis/disinformation, xenophobia and propaganda. The increasing level of education in countries that experience demographic explosions leads to a gradual decrease in birth rates. Economic development and foreign investments create productive and fair employment opportunities, reducing the levels of domestic, regional and international migration.

IN THE EU, THE MEGATRENDS DRIVE FAVOURABLE DEVELOPMENTS IN THE POLICY FIELD OF BORDER MANAGEMENT, ASYLUM AND MIGRATION.

Drawing on broad political consensus, new EU policies and legislation improve the overall preparedness and effectiveness of national and EU agencies. Key components of European IBM receive particular policy attention.

INTERNATIONAL COOPERATION WITH THE TOP-20 COUNTRIES OF ORIGIN AND TRANSIT OF IRREGULAR MIGRATION, THE CREATION OF LEGAL CHANNELS OF MIGRATION, BETTER INTEGRATION SCHEMES FOR MIGRANTS AND REFUGEES AND A HOST OF OTHER MEASURES CONTRIBUTE TO POSITIVE OUTCOMES.

The EU builds external relationships based on mutual trust and respect, effectively addressing the concerns and needs of countries of origin and transit. Major EU development aid programmes with robust implementation measures help third countries deal with key push factors (e.g., climate change, widening inequalities, demographic growth, limited education and employment opportunities, environmental degradation). With strong political and operational support, third countries in the EU neighbourhood tackle people-smuggling networks. The EU adopts 'exceptional' legal and operational measures to counter the instrumentalisation of migration for political purposes by certain third countries. As a result, the EU does not experi-

ence a migratory crisis in this decade and the situation in the EU neighbourhood and beyond stabilises, facilitating cooperation on border and migration management.

FRONTEX PLAYS AN IMPORTANT ROLE IN THE IMPLEMENTATION OF FAR-REACHING REFORM ON BORDER, MIGRATION AND ASYLUM MANAGEMENT.

Due to the positive trends in the international environment, Frontex improves its technical cooperation with third countries and manages to close the persistent gap between effective returns and return decisions, allowing for more effective border management. A host of measures (e.g., improved early warning and analysis on returns, return agreements, identification of individuals and unaccompanied minors, digitisation of identities, issuance of consular passes) provide for an effective system of EU returns.

BORDER CONTROLS DEMONSTRATE HIGH LEVELS OF PROFESSIONALISM, EFFECTIVELY PROTECTING THE INTEGRITY OF THE

EXTERNAL BORDER AND RESPECTING THE HUMAN RIGHTS OF MIGRANTS AND REFUGEES.

Frontex mobilises additional resources and makes use of technological advances for better risk management. In this way, it improves the performance and outcomes of border control and law-enforcement activities (e.g., combating cross-border crime including document fraud). Frontline Member States have appropriate reception capacities and operational plans to handle any contingencies or disproportionate migratory flows. Secondary movements within the Schengen Area are limited and internal controls are unnecessary. There is improved cooperation between EU Member State border and coast guard authorities that is further supported by international cooperation schemes. Large-scale IT systems and databases enable interoperable and effective operations against security threats (terrorism, foreign fighters, criminals). High-quality common training is provided to Frontex and national authorities' staff and best practices are shared, bringing about measurable performance improvements.

BORDER SURVEILLANCE GETS SIGNIFICANT UPGRADES IN TERMS OF CAPABILITIES AND CAPACITIES, EMPOWERING THE AGENCY'S LAW ENFORCEMENT ROLE AND ACTIVITIES AGAINST CROSS-BORDER CRIME AND TERRORISM.

Flexible adaptation to the activities of criminal networks (changing routes and *modi operandi*) brings about considerable results. Improved security at the external borders supports the EU's internal security.

FRONTEX EMERGES AS A KEY STRATEGIC PARTNER NOT ONLY FOR NATIONAL BORDER AND COAST GUARD AUTHORITIES, BUT ALSO FOR EU AND NATIONAL LAW-ENFORCEMENT AGENCIES THAT FIGHT CROSS-BORDER CRIME AND TERRORISM.

Frontex cooperates closely with Europol conducting joint analyses and sharing information on cross-border crime and terrorism that inform operational activities. The Agency's growth is also reflected in inter-agency and cross-pillar cooperation initiatives (e.g., CSDP missions).

FRONTEX'S RISK AND INTELLIGENCE ANALYSIS CAPABILITIES ARE SIGNIFICANTLY IMPROVED WITH APPROPRIATE HUMAN RESOURCES AND DEPLOYMENT OF STATE-OF-THE ART TECHNOLOGICAL APPLICATIONS.

Early-warning systems and information sharing with EU Member States and countries of origin and transit of migration help in anticipating migrant movements towards Europe. These systems facilitate all-source collection, multi-method analysis and reporting on all thematic areas. Technical cooperation with third countries helps improve their border security performance. International information-sharing, searches in EU databases, and Frontex's European Travel Information and Authorisation System (ETIAS) help identify high-risk individuals.

QUALITY-CONTROL MECHANISMS HELP IMPROVE THE PROCESSES AND OUTCOMES OF EUROPEAN INTEGRATED BORDER MANAGEMENT AT ALL ORGANISATIONAL LEVELS.

The findings of quality controls identify potential vulnerabilities and shortcomings in the Schengen Area and EU border management providing opportunities for the development of European and national systems.

SOLIDARITY MECHANISMS INCLUDING FUNDING INSTRUMENTS ARE IN PLACE TO ALLOW EU BORDER MANAGEMENT TO FULFIL ITS MISSION.

That includes, among other things, funding for the development of the EBCG Standing Corps to 15 000 staff by 2034, the interoperability of border systems, and the infrastructural development and procurement of technical equipment in line with the EBCG's capability development planning.

A NEW SET OF RULES MANAGING MIGRATION AND ESTABLISHING A COMMON ASYLUM SYSTEM ARE IN PLACE (THE PACT ON MIGRATION AND ASYLUM).

Any sudden migratory pressure on one or several Member States is mitigated through relocation of migrants, transfers, financial contributions or operational support between the EU and the other Member States. At the same time, the safeguarding of migrants' fundamental rights is one of the top priorities in the implementation of these rules.

7.2. WORST-CASE SCENARIO

A TURBULENT GEOPOLITICAL AND SECURITY ENVIRONMENT GENERATES NEW CHALLENGES FOR BORDER CONTROL, EXACERBATING HYBRID THREATS.

In a multipolar world, the diversification of threats in the context of a new and highly volatile security paradigm impacts border control as well. The lessons learned about instrumentalisation of migration have become obsolete, as unconventional (categorised as hybrid) threats have risen for both border checks and border control. Misinformation, disinformation and online propaganda periodically generate large groups of persons approaching the EU's external borders simultaneously with the intention of crossing the border illegally or simply to generate high alerts for the border authorities in order to measure their response capabilities.[113]

EIBM IS CHALLENGED BY THE INCREASED PRESSURE ON BORDER CONTROL.[114]

By 2034, the volume of border traffic has grown considerably, reaching volumes that are difficult for the border authorities to process. The waiting time at the borders has increased tenfold while the volume of human resources available for border control has decreased considerably. In order to cut costs, national authorities have come to rely on digitalised border controls and have heavily reduced the human factor in border management. This has generated vulnerabilities exploited by organised crime, which has already identified multiple ways to circumvent the electronic fences/obstacles at the green border, automatic border-control gates and security elements of biometric passports.

The change of governance systems in the first and second tiers of EIBM have affected both the number of persons and the profiles of the persons willing to cross the border. This has generated cross-border movement not only of seekers of international protection but also of high-risk individuals[115] causing a threat to the EU's internal security. The lack of cohesion at EU level in the political approach towards border management has increased border vulnerability of certain border sections on the EU's external borders. In addition, the lack of resources or a harmonised approach to health challenges has generated threats difficult to manage for border-control authorities.

The governments of several EU Member States have decided, justified by national security, to overlook fundamental rights obligations, heavily limiting access to international protection and asylum, disregarding vulnerable groups of persons, and closing several border-crossing points. Additionally, collective expulsions have become a practice in some Member States, allegedly justified by national security reasons.

BY 2034, THE LACK OF COOPERATION BETWEEN LAW-ENFORCEMENT AGENCIES RESPONSIBLE FOR BORDER CONTROL AT NATIONAL LEVEL HAS GENERATED A CONSIDERABLE DOWNTURN IN BORDER SECURITY.

The national governance system has decentralised border-control tasks to several agencies responsible for migration management, search and rescue, national security, customs and border management. These agencies use incompatible IT systems and are duplicating their operational efforts due to overlapping legal competences. They are reluctant to make joint efforts and cite sovereignty in border control as the reason. They liaise with EU and international counterparts in a challenging manner and compete at national level instead of cooperating at least in the EIBM domain. In addition, search and rescue operations for persons in distress at sea are deprioritised and consequently more people are losing their lives at sea.

Risk analysis supporting border control is limited both in terms of information acquired, resources available and networking with counterparts. CIRAM is inadequately implemented.[116]

TENSE RELATIONS WITH THIRD COUNTRIES[117] HAS GENERATED VULNERABILITIES FOR BORDER CHECKS AND HAS PRECLUDED READMISSION AND RETURN ACTIVITIES, WHICH IN TURN ACTS AS A PULL FACTOR FOR IRREGULAR MIGRATION.

Political changes in third countries and the deteriorating fundamental rights situation has impeded cooperation with EU Member States at most levels, including in border management. The relaxed border control at the EU's external borders combined with national authorities' reluctance to exchange information and the alleged involvement of the national authorities in facilitating irregular migration, act as a pull factor for irregular migrants. As the readmission agreement with the neighbouring state was suspended, the number of irregular border-crossing attempts has grown enormously. International agreements with other neighbouring EU countries have deteriorated in the political context to the point of ineffectiveness.

The overloaded national systems, the challenged social acceptability of returns and the lack of interoperability of Frontex IRMA[118] with Member States' IT return systems and other relevant IT tools[119] combined with the deteriorating security situation in countries of origin make it impossible to effectively implement return activities. EU Member States have not been using Frontex-coordinated joint return flights due to legal challenges and the number of persons residing in the EU illegally has grown considerably, also acting as a pull factor for further irregular migration.

BY MIDTERM FUTURE (A FIVE-YEAR PERSPECTIVE) BORDER CONTROL RELIES

UPON A HIGH LEVEL OF DIGITALISATION CREATING SUBSTANTIAL VULNERABILITIES WITHIN THE PROCESS.

The lack of human resources, reduced job attractiveness and the high cost of employment, triggers digitalisation of border control across the EU. These technological systems face challenges from hybrid hacking by organised crime groups and hostile state-sponsored actors. These large-scale information systems, meant to ensure high quality of border control, and their server connection were physically attacked during a natural disaster and the critical infrastructure proved limited resilience.

Border surveillance enforced by virtual fences is of limited efficiency as the heat print is often misinterpreted by the system and the lack of the human factor to interpret alerts enables undetected irregular border-crossings. In addition, the limited reaction capability to system alerts due to the lack of human resources creates a vulnerability to simultaneous irregular border-crossings of large groups of people.

THE QUALITY CONTROL MECHANISM FAILS TO SUPPORT BORDER CONTROL.

The changes of the political regime in several EU Member States and Schengen Associated Countries have been to the detriment of the Schengen System, acting in favour of strong national control mechanisms, sometimes without consideration for fundamental rights. The SIS has been affected as national systems have become incompatible requesting manual uploads of databases accompanied with serious technological biases.

Furthermore, both the equipment used and the level of staff training no longer meet previously agreed standards. This has caused a serious decrease in the quality of border control, and cross-border crime has exploited this and increased considerably.

EU FUNDING FOR EIBM CUT.

The budget of Frontex has been dramatically reduced, and this has limited the support provided by the Agency at the EU's external borders. The fundamental rights monitoring mechanisms at EU and national levels have also become ineffective due to these budget cuts. Research and development as well as education and training are no longer considered a priority.

The prioritisation of EU funding at national level is heavily politicised regardless of the outcome of the Schengen Evaluation Mechanisms and vulnerability assessment, generating serious gaps which are further exploited by organised crime, and especially irregular migration.

THERE IS NO CAPACITY FROM MEMBER STATES TO PERFORM ANY FOURTH-TIER[120] POLICE MEASURES MEANT TO TACKLE IRREGULAR MIGRATION AND CROSS-BORDER CRIME.

The responsibility for border control has been entirely delegated to EU Member States with external land and sea borders, which focus on third-tier measures[121]. The need for fourth-tier operational activities has been rendered redundant as border control on the EU's external borders should ensure a 100% rate of detection.

Due to the lack of exchange of information, intelligence and analysis it has become impossible to generate a common situational/intelligence picture at European level meant to enable activities in the fourth tier of the European IBM, especially in the area of secondary movement. In this context, cooperation between Frontex, Europol and EUAA is also limited, both in producing joint analysis and triggering common operational efforts.

INCREASING DEMOGRAPHIC IMBALANCES HAVE ENGENDERED MIGRATION TOWARDS THE EU'S EXTERNAL BORDERS AND LARGE COMMUNITIES OF IRREGULAR MIGRANTS ARE ACCUMULATING IN THE COUNTRIES NEIGHBOURING THE EU.

Migratory pressure on borders has increased considerably at the same time as Frontex has been facing budget cuts and a reduction in Standing Corps staff. The expiry of Standing Corps contracts combined with the strategic decision that Frontex will focus more on SAR activities has generated vulnerabilities for border surveillance. In addition, accelerating technological change and hyperconnectivity has engendered new *modi operandi*, allowing migrants to cross the border with the aid of drones, virtual reality, night vision etc.

The interplay of two megatrends — technological developments and the changing security paradigm — has enabled a wider range of cyber and hybrid threats. Migrants are used to generate fake humanitarian crises, misinformation and deep-fake election intervention tactics. Border control is heavily impacted by the interplay of these two megatrends which have generated technical possibilities to circumvent automatic border controls.

A NEW SET OF RULES MANAGING MIGRATION AND ESTABLISHING A COMMON ASYLUM SYSTEM ARE IN PLACE (THE PACT ON MIGRATION AND ASYLUM).

Although the new rules were supposed to enhance and strengthen the EU system to manage migration and focus on secure external borders, the Pact's uneven implementation across Member States has exacerbated migratory pressure at some external borders managed by Member States reluctant to implement the Pact. Additionally, the crisis protocols and actions against instrumentalisation of migration are not homogeneously implemented at EU level and the new border procedures have failed to ensure robust screening and a common standard for qualifying for refugee status.

7.3. BASELINE SCENARIO

CHALLENGES FOR BORDER CONTROL HAVE EVOLVED OVER THE YEARS INFLUENCED BY MEGATRENDS AND SOCIETAL CHANGES.

General migration pressure has returned to the pre-pandemic level and may surpass it, exerting considerable pressure on the EU's external borders, despite a significant increase in border control and surveillance capabilities. The pandemic generated enhanced inter-agency cooperation between national authorities and greater resilience, which translated into contingency plans for border management and police cooperation at EU level.

THE CHANGING SECURITY PARADIGM AND WORLD MULTIPOLARITY, ALONG WITH THE PRESENCE OF NON-STATE ACTORS CHALLENGES IDENTIFICATION PROCESSES IN BORDER-CONTROL SYSTEMS AND COMPLICATES ASSESSMENTS OF WHETHER INDIVIDUALS POSE A THREAT TO THE INTERNAL SECURITY AND PUBLIC ORDER OF THE SCHENGEN AREA.

Hybrid threats sponsored by state actors are increasingly difficult to combat. They are used to undermine the security of the Schengen Area

and to increase internal divisions. Cyberattacks and instrumentalised migration threaten systems and other capacities used for border control. The division of tasks and intelligence-sharing between migration management, border control, law enforcement and army authorities are now more important than ever.

However, despite their importance, border-control infrastructures are not included in any of the lists of critical infrastructure identified by the European Union, which raises the challenge of performing comprehensive risk assessments and of identifying relevant hybrid threats and adequate mitigating control measures.

RAPID TECHNOLOGICAL CHANGES INCLUDING AI AND BIG DATA SYSTEMS HAVE CREATED OPPORTUNITIES AS WELL AS CHALLENGES FOR BORDER CONTROL.

Risk analysis, profiling, intelligence exchange and queries in entry and exit systems have become much easier to do. Border surveillance is enhanced using drones, and new anti-drone systems combat hostile/smuggler drones. Virtual fences have been installed where actual fences cannot be built. Border management authorities have made significant investments in research and development to bring in these new technologies. However, vulnerabilities were also created. Cyberattacks are orchestrated by hostile actors against these technologies and the large-scale IT systems used for border checks. Hybrid actors attempt to steal information, spread false information and interrupt border-control services.

In the context of a strong link between cyber and physical threats to border control, and of the increased complexity of IT systems and digital technologies, the lack of specific cybersecurity standards and frameworks for border control affects the overall security of the information infrastructure and also increases the effectiveness of cyberattacks.

INCREASED DIGITALISATION OF CROSS-BORDER CRIME MAKES THE ARREST AND PROSECUTION OF PERPETRATORS VERY DIFFICULT AND INCREASES THE ATTRACTIVENESS OF MIGRANT SMUGGLING EVEN OVER CIGARETTE AND DRUG SMUGGLING.

Criminals' access to state-of-the-art technology enables automatic border-control mechanisms to be bypassed and even the misuse of personal information. Border-control authorities and criminals have extended their area of expertise to new technologies. In this context, effective data protection as well as the protection of the large-scale IT systems used for border control has become a vital aspect of IBM.

Border surveillance and search and rescue activities are confronted by a diverse set of actors (cross-border crime facilitators, humanitarian NGOs, state actors intending to create unrest in the EU) who will increasingly make use of information technology as well as technology-disruptive campaigns to promote their viewpoints and goals.

Cooperation with third countries declines, given the diverging interests regarding migration to the Schengen Area. As remittances from migrants provide an income for several countries of origin, these states are reluctant to accept returns. They also use the EU's migration management tools and incentives for their own advantage. There is an increasing need to establish sustainable and realistic migration partnership schemes between the EU and third countries. However, this attempt is disrupted by the challenging international security situation and changing alliances. Nevertheless, the work within the Schengen Area on returns benefits from the increased use of common information systems, but at the same time, lengthy legal procedures and possibilities for appeals (which also vary between Member States) continue to hamper cost-effective returns.

The quality-control mechanisms for border management continue to work as a 'watchdog' for the implementation of EU policies. Since the European information systems are part of the Schengen acquis, they are also subject to evaluations, but challenged, according to statistics, by the abundant number of queries. Due to their scope and focus on the implementation of EU law, the established quality-control mechanisms (namely the Schengen evaluation and vulnerability assessment) propose that the expansion of Schengen law will remain limited. The narrow focus of the quality-control mechanisms to only the Schengen acquis creates an imbalance at national level with less focus on related policy areas within the domain of national legislation, impeding the development of relevant topics to a 'whole-of-government approach'.

The use of solidarity mechanisms such as the BMVI and the coming redistribution schemes under the Asylum and Migration Management Regulation (AMMR) are evening out the costs of integrated border management across Member States. Due to the increasing number of irregular arrivals from third countries, the AMMR redistribution scheme is under pressure. The implementation of the border procedures under the asylum procedures directive is hampered and complicated by the limited possibilities for reducing secondary migration. Their implementation will also continue to be criticised from the fundamental rights perspective.

Accelerating technological change and hyper-connectivity have a positive impact on border management but also generate new challenges in terms of *modi operandi* and concealment of facilitators. Border control has implemented new technologies, ranging from highly accurate automatic border checks to virtual fences at the EU's external borders. However, criminal groups and hostile state actors also have access to this technology and have found methods to circumvent the new systems for cross-border crime purposes in general and migrant smuggling in particular. Relying on technology to compensate for reduced availability of human resources has generated vulnerabilities in border control, especially if new *modi operandi* are not detected.

These vulnerabilities are exploited in the context of the new security paradigm. The diversification of threats will not be limited to border permeability but will be felt across the new field of confrontation, which will range from the instrumentalisation of migration to unconventional weapons use and cyberattacks. Increased interdependencies between the cyber and physical threat landscape surrounding border control will require more advanced integration of physical, cyber and human elements, whether they are considered as part of the risk assessment or as part of the mitigating controls.

The interplay of the megatrends combined with the increasing significance of migration generates social unrest triggered by the economic situation in the EU. This unrest is used by state and non-state actors to gain capital in more participatory forms of governance. The use of new technologies is not only limited to new *modi operandi* but also appeal to emotions and personal beliefs inside the EU. This has generated a trend focusing more on humanitarian aspects and international protection than on security within the area of free movement.

Climate change and environmental degradation has caused severe changes in economies around the world. Environmental changes are likely to continue and will result in an ever increasing number of persons moving towards the EU in an attempt to improve their prospects of a better life. Climate change also generates extreme weather events such as heatwaves, storms, floods and/or fires necessitating contingency plans to be put in place.

Any form of hybrid interference previously identified as having an impact on border management is now evolving to circumvent the mitigation measures. Virtual barriers built on the EU's external borders prove to be of limited effectiveness as more migrants claim international protection to enter the EU.

7.4. HYBRID-THREAT SCENARIO

HYBRID THREATS, INCLUDING THE INSTRUMENTALISATION OF MIGRATION, ARE INCREASINGLY COMMON WAYS FOR HOSTILE STRATEGIC ACTORS TO EXPLOIT DEMOCRATIC VULNERABILITIES IN EUROPE TO ACHIEVE THEIR OBJECTIVES.

Over the next decade, several trends combine to increase EU/Member State vulnerabilities to hybrid threats while emboldening key countries of origin and transit to orchestrate migratory movements. While state actors are most apt at using the hybrid toolbox, non-state actors such as powerful organised crime groups take part in this development as they provide cover for state actors whenever interests align and a business motive is exploited. State and non-state actors (the latter could be proxies of the former and may include ideological groupings and movements such as the Islamic State) coordinate and synchronise their actions and non-state actors independently employ hybrid tools in order to, for instance, overwhelm border surveillance and management.

Strategic actors more frequently resort to directing and facilitating migratory movements in a multipolar international environment in which Europe is losing influence in key regions (also owing to competition with other powers) and in which transactional multi- and bilateral relationships dominate over international rule-sets that underpin international norms, including those governing international migration. This rise of autocracies and their challenge to the liberal international system may legitimise the use of hybrid threats.
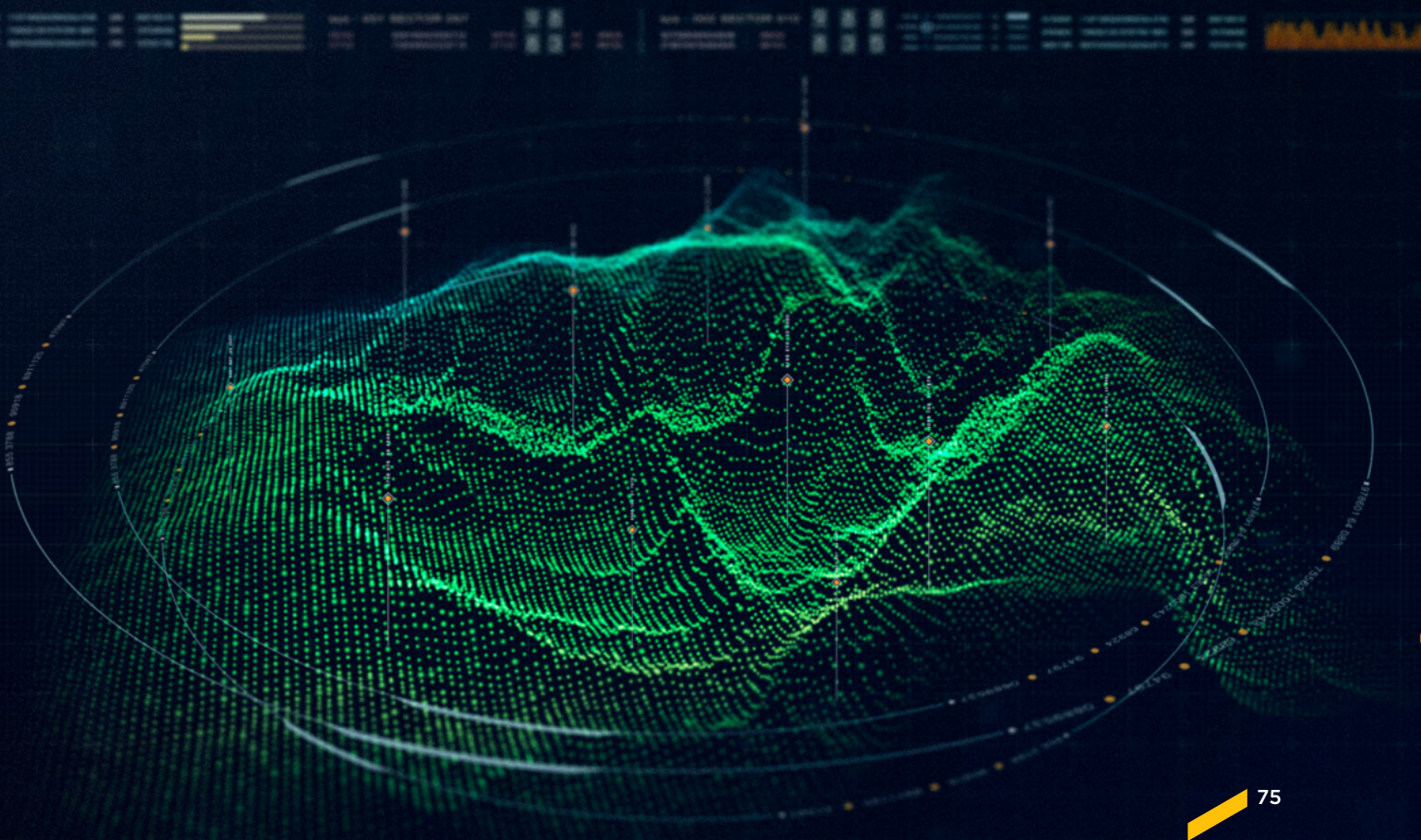
In a world where Europe continues to be wealthy and conventionally more powerful compared to many actors, instrumentalised migration and other hybrid threats constitute cheap, asymmetric and high impact means to push through third countries' agendas. The European Union, with institutionally complex decision-making, continues to present a target to a determined hybrid actor who understands the systematic vulnerabilities of EU populations faced with situations imposed upon them with polarising media imagery of victimisation and human agony. The free press, which is the part of the media landscape over which state actors do not exercise close control, is naturally vulnerable to hybrid actors.

Third countries may use hybrid threats regarding migration and its control as a bargaining chip in negotiations with the EU or its Member States. These countries effectively blackmail the EU/ Member States by claiming that they are unable to address people smuggling/facilitation by organised crime without financial and other support.

The strategic objectives of players using hybrid threats is wide-ranging. While one of the objectives of using this tool could be to weaken the EU/Member States internally, hostile actors could stress test borders to draw lessons for their military planning. Disabling or slowing down a target's decision-making could be the primary goal or, indeed, an unintended consequence. Distracting decision-makers/populations from other issues of importance may also be a motivation. Finally, hybrid actors may use instrumentalised migration to threaten their domestic audiences.

Vulnerability to hybrid threats is equally elevated by the increased significance of migration as a societally polarising/divisive issue. The public attention the topic receives is an enabler for political groups who seek to use migration to promote a political viewpoint shared by the very same autocratic regimes that use the hybrid toolbox. Autocracies have the ability

to channel state resources to create, facilitate or enable hybrid warfare on the external borders of the EU. Meanwhile, financial incentives often align with the objectives of the hybrid actor in that, on the one hand, revenue can be generated from facilitation of migration given that migrants/refugees are willing to pay for a future in Europe. This illicit revenue may be distributed to elites to prop up regimes. Meanwhile, remittances from migrants who find work in Europe are important sources of income for certain countries. For example, according to the World Bank[122], in 2022 over half of Tajikistan's GDP was due to remittances.

THE SPEED OF TECHNOLOGICAL ADVANCEMENTS AND OVER-RELIANCE ON TECHNOLOGY HAS DRAWBACKS THAT HYBRID ACTORS MAY CAPITALISE ON.

Technological change has strengthened EIBM with new safeguards such as EES and ETIAS. At the same time, it has created new vulnerabilities to hybrid threats (vulnerable infrastructure, including large-scale IT systems exposed to cyberattacks). There is a certain danger in an overreliance on technology for border control, in particular when a highly complex, unregulated and not always transparent supply chain provides the technologies and their support services. Meanwhile, certain technologies empower new ways of facilitation, including new *modi operandi* (drones and mapping apps for remotely guided migratory movements, for instance). Hyperconnectivity, the digital society, and social media echo chambers provide ideal grounds for spreading disinformation, which influences public opinion, weakens democratic decision-making and heightens the impact of any migratory phenomenon. It becomes increasingly difficult to verify information, and objective truth fades away. Artificial intelligence has deepened the technological divide and reinforced pull factors to Europe, but it is also misused by hybrid actors to generate and scale up disinformation, steer migration at will or target the vulnerabilities of IT systems

through cyberattacks. Technology is employed to dissociate people smugglers from their clients physically — thus allowing smugglers to operate outside the jurisdiction of EU law enforcement — and in terms of information technology (encryption, for example). Finally, technological innovation supports the production of tools (including, for example, undetectable weapons) for cross-border crime, which are utilised by hybrid actors to bring agitators/operatives into theatres of operations.

EUROPEAN INTEGRATED BORDER MANAGEMENT FACES HYBRID THREATS FROM MULTIPLE DIRECTIONS.

Instrumentalised migration may come from any direction in Europe's neighbourhood. Russia and Belarus remain at odds with the West and the threat of hybrid attacks on the EU's eastern borders/Member States persists. Russia is also uniquely positioned to use its influence and proxies in the south of Europe and North Africa to launch hybrid attacks.

Countries of origin of potential migrants and countries that orchestrate migration may be different, but the latter already host large groups of migrants which could be exploited. Other potential hostile actors would need to build the logistics and organise migration first to mount a hybrid threat.

The Belarusian example of 2021 is instructive and can give a glimpse into a possible future: Belarus organised the arrival of Middle Eastern nationals, changing its visa regime and opening new air routes to Minsk. This could be an example for any third country sharing a border with the EU in the future. Secondly, (clandestinely) state authorities facilitated migration to the EU in a wide variety of ways, from directing migrants to unmanned border sections to giving them tools to overcome technical obstacles, short of directly engaging border guards.

A determined EU/Member State response to such hybrid challenges also may lead their originators to choose more covert ways to orchestrate migration and resort to approaches that lend themselves to more credible deniability. Beyond targeting external borders, the goal is to create discord and chaos within the EU/Member States also through using advanced technologies. Non-state actors independently use tools out of the hybrid toolkit, and the strategic environment could be one where non-state actors pose the larger problem.

New hybrid tools and applications are devised. Diverting the attention and resources of border management to open vulnerabilities elsewhere ('Potemkin migrant flows') are enabled by deepfakes or, for instance, novel applications of augmented reality. New *modi operandi* use previously unobserved transport means from hitherto unseen geographic locations.

A great range of hybrid tools used in a coordinated manner and carefully synchronised with migratory phenomena are seen. While disinformation and cyber are likely to accompany almost any hybrid attack, given their inexpensive deployment and impact, the EBCG needs to prepare for scenarios that involve a combination of hybrid and conventional threats, for instance the targeting of physical infrastructure critical to border management operations (communications infrastructure for instance). Orchestrated migratory movements may be used to enable the movement of operatives/agitators/terrorists to their theatres of operations.

A EUROPEAN BORDER AND COAST GUARD EQUIPPED TO RESPOND TO HYBRID THREATS.[123]

To allow the EBCG to timely detect upcoming hybrid threats, the situational picture and risk analysis is updated in real time, focusing on such threats, including the identification of weak signals, and escalating them promptly. Information resources in the border manage-

ment environment are streamlined to detect such threats. The EUROSUR system is empowered to take into account hybrid threats and the CRRS collects all possible anonymised data from large-scale IT systems such as EES, ETIAS, VIS to analyse them and capture events as they happen, while open-source intelligence is monitored to complete the picture. The intelligence community working on such threats is well connected, including through the daily exchange of information and the active participation of EBCG representatives in the EU Hybrid Fusion Cell (based at EEAS INTCEN).

Whenever a hybrid threat is detected, the EBCG community acts swiftly and in a unified manner, with the aim of disseminating credible, actionable information. This information is used to address the orchestrators, uncover their intentions, and thus discourage them from pursuing the threat. Other entities that are instrumental in the threat are also approached, e.g., airlines are informed that they could be banned from operating in the EU if they take part in hybrid activities.

The EBCG is agile in its response, using profiles relevant to cybersecurity, detecting and actively countering disinformation that has been established within the Standing Corps and operating in rapidly deployable teams focusing on specific hybrid threats. Stress tests of various hybrid scenarios are performed on a regular basis, while scenarios for use in MSs are developed and kept in reserve. The large-scale IT systems are updated in a timely manner to adapt to the signals discovered, as well as collect relevant data in real time.

As dealing with constantly changing hybrid threats while respecting fundamental rights proves extremely challenging, Frontex's FRO, in close collaboration with the hybrid threat teams, liaises with all departments of the EBCG and keeps updating practical guidelines on how to ensure non-discrimination, respect for human dignity and protection of personal data while efficiently dealing with threats.
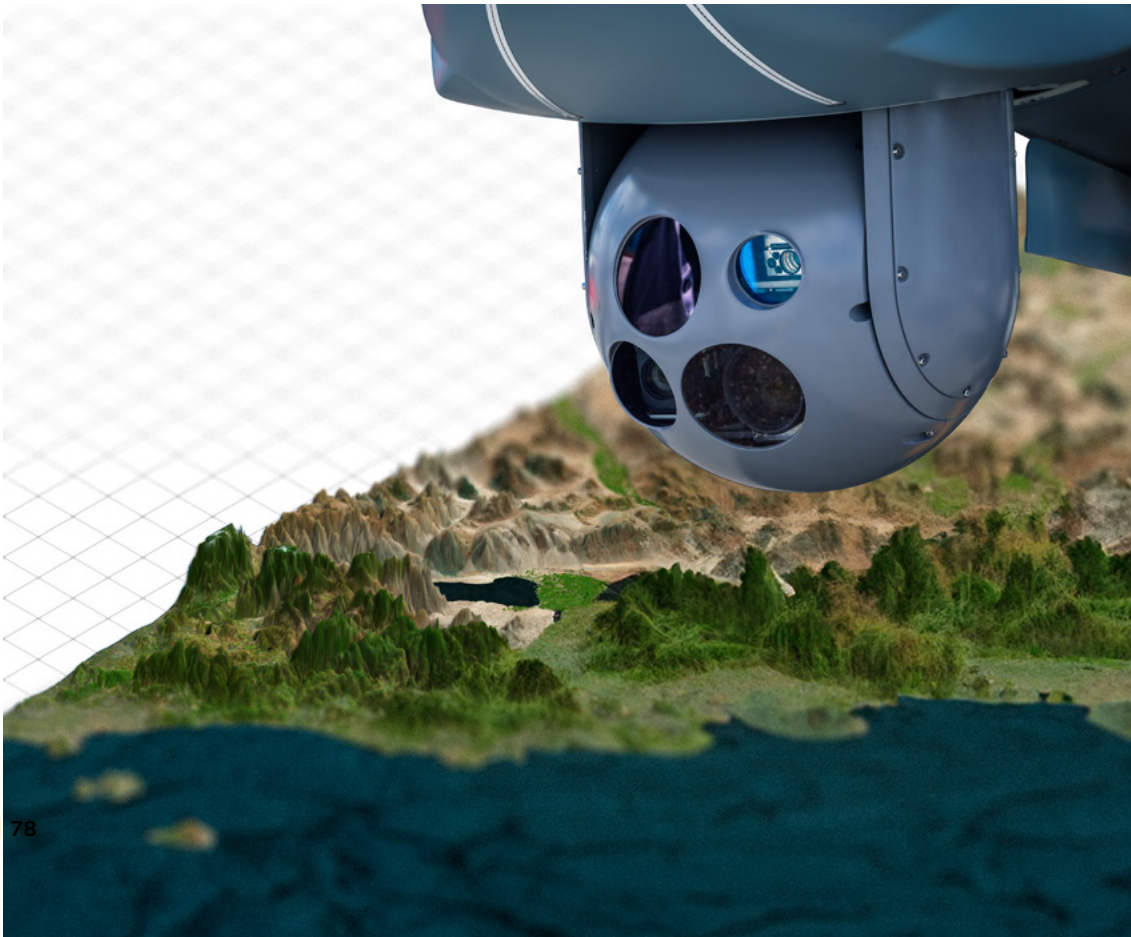
8. Conclusion

MEGATRENDS

Geopolitical and security conflicts constitute a key threat over the next decade. European IBM should organise for a turbulent decade and prepare for ominous scenarios. The ongoing wars and instability in the EU's neighbourhood (e.g., Ukraine and Gaza), together with any new security crises, will likely be the key drivers of migratory and refugee movements into Europe.

IRREGULAR MIGRATION

It is very likely that EU border and migration management will face multifaceted challenges in the decade to come. Recently adopted measures, namely the new Pact on Migration and Asylum as well as the amendments to the Schengen Borders Code, will enhance the response of border control and migration management authorities to instrumentalised migration, health crises and secondary movements.

Migratory pressures will most likely increase during the next decade, requiring substantial improvements in general and crisis preparedness. European IBM will need to be made more resilient and operational and legal vulnerabilities will need to be reduced. Reactive policies and domain-specific operational responses might have only limited effects on migratory and refugee flows towards the EU.

The top-20 source countries for irregular migration, and the key migratory routes to the EU, will likely remain the same in the next decade. Due to geopolitical conflicts and the war in Ukraine, there will be a higher probability of irregular migration through the eastern borders of the EU.

Besides hostile geopolitics and security crises, the interplay of other key drivers of national, regional and international migration (such as structural and systemic inequalities, economic crises, climate change, environmental degradation, resource scarcity and demographic changes) will significantly affect the situation in low-income countries and drive migratory flows towards the richer countries of the world.

RETURNS

The sociopolitical need for the effective management of return processes is evident across the EU. The gap between actual migrant returns and the number of migrants who enter the EU highlights the need to prioritise returns on the political agenda and in operational responses.

Aligning policies, common measures and cooperation with third countries in the area of returns, improving interoperability, digitalisation and return systems per se will improve return processes. Frontex will continue to work on common standards and requirements for return case management systems within and outside the EU, promoting the optimisation of return processes (e.g., RECAMAS reference model).

CROSS-BORDER CRIME

Migrant smuggling has long been a contentious issue, and has a significant impact on both the external borders and internal security of the European Union. Typically, over 90% of irregular migrants who reach the EU use smuggling services for parts or all of their journey. Technological advancements are likely to play an important role in reshaping future migrant-smuggling

activities. With the proliferation of encrypted communication channels, blockchain-based transactions, and sophisticated surveillance systems, smugglers may adapt their methods to evade detection more effectively and enhance operational efficiency.

In response to these evolving challenges, policy-makers and stakeholders must adopt a multifaceted approach. Targeted enforcement measures using the latest technologies should be combined with comprehensive strategies to address the underlying drivers of migration. This entails mutual understanding and solidarity among MSs in managing migration, enhancing international cooperation and information-sharing mechanisms to disrupt smuggling networks, while also investing in measures aimed at promoting socioeconomic development in countries of origin and safeguarding the rights of migrants.

Smuggling of illicit and excise goods constitutes a serious threat to the internal security of the EU. The criminal networks responsible for the import and distribution of smuggled goods in the EU are based outside the EU. The use of drones and other unmanned craft as well as the use of advanced artificial intelligence devices will exacerbate future threats. This will necessitate investments in technological solutions (e.g., advanced surveillance and detection systems) at the EU's external borders.

Diversity in cross-border criminal activities is underpinned by a low-risk, high-profit business model and ties between criminal groups in third countries and in the EU. With AI and increasingly advanced techniques incorporated into criminal activities, new and highly sophisticated *modi operandi* will likely emerge.

The deteriorating security situation in the vicinity of the EU's external borders is expected to hinder EU and MS efforts to prevent cross-border crime. So enhanced measures to monitor accurately and consistently the movement of passengers/goods into/through EU in conjunction with intelligence-led activities (e.g., risk profiling) will need to be strengthened. In the context of border security, the uninterrupted flow of bona fide travellers should be a priority both for security and contingency planning.

Trafficking in human beings, especially of victims originating in third countries, is a lucrative criminal business which will continue to grow. In the EU, THB is dynamic and often follows recent developments of humanitarian crises around the world. Raising awareness and cooperation between the law enforcement agencies will be crucial in the fight against it. The planned update of the risk profiles will assist border guards in identifying potential victims of trafficking during first- and second-line checks at EU and SAC air, land and sea borders.

Property crime in general as well as vehicle crime will continue in the future, very likely encompassing electric or hybrid vehicles/vehicle parts. Document and identity frauds are instrumental for a broad range of criminal activities, and one of the fastest evolving drivers for various types of cross-border crime. Within the next decade, the challenges to border management posed by identity and document fraud will significantly evolve, mainly driven by changes in dominant security and regulatory paradigms across the globe, sociopolitical developments and technological advancements.

Border control and management systems such as ETIAS, EES and the VIS regulation will soon be fully implemented, boosting information exchange and security within the EIBM system, but also likely contributing to an increased number of illegal border-crossings at the land and sea borders, as migrants try to evade enhanced controls. Travellers who do not receive traveller authorisation or a visa, will also increasingly resort to document and identity fraud to try to enter the EU.

As a result, cooperation on migration, returns and cross-border crime between Frontex and the competent third-country agencies in Africa, the Middle East and southeast Asia will have to be prioritised and enhanced further.

TERRORISM AND HYBRID THREATS

Terrorism will continue to be used by state/non-state actors and/or individuals as a tactic to channel specific political, ideological and/or religious messages, or as an attempt to dismantle the current political or socioeconomic order.

Hybrid threats will be a recurring challenge to European security and IBM. Since hybrid interference is not limited to border areas between neighbouring states, it can have potentially global reach and implications. The EU and its Member States will continue to develop their preparedness to prevent and respond to hybrid challenges.

The continuous development of the EU's crisis management systems and capabilities will be necessary to dissuade hostile state actors from resorting to hybrid threats against it. The EU's cybersecurity awareness on possible future threats and the promotion of countermeasures are a must in safeguarding the efficient functioning of large-scale border management systems as well as countering cross-border crime.

FUTURE SCENARIOS

Aspects of all the scenarios presented in this report (i.e., best-case, worst-case, baseline, and hybrid-threat scenarios) are likely to happen and thus require careful consideration by policymakers. Their likelihood is dependent on geopolitical developments, the interplay of megatrends, and any unpredictable or 'black swan'-type of events. Nevertheless, the hybrid-threat scenario has a high likelihood as European IBM will potentially face hybrid threats from multiple directions over the course of the next decade.

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113. e.g., the Caravan of Hope/ Caravan of Light approach

114. The worst-case scenario for border control is the incapacity of a MS to perform it at the qualitative standards agreed.

115. terrorists included.

116. CIRAM — Common Integrated Risk Analysis Model

117. of the 4-tier access control model

118. Integrated Return Management Application

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123. This is in a way a best-case scenario of this hybrid scenario, containing policy recommendations.

FRONTEX

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