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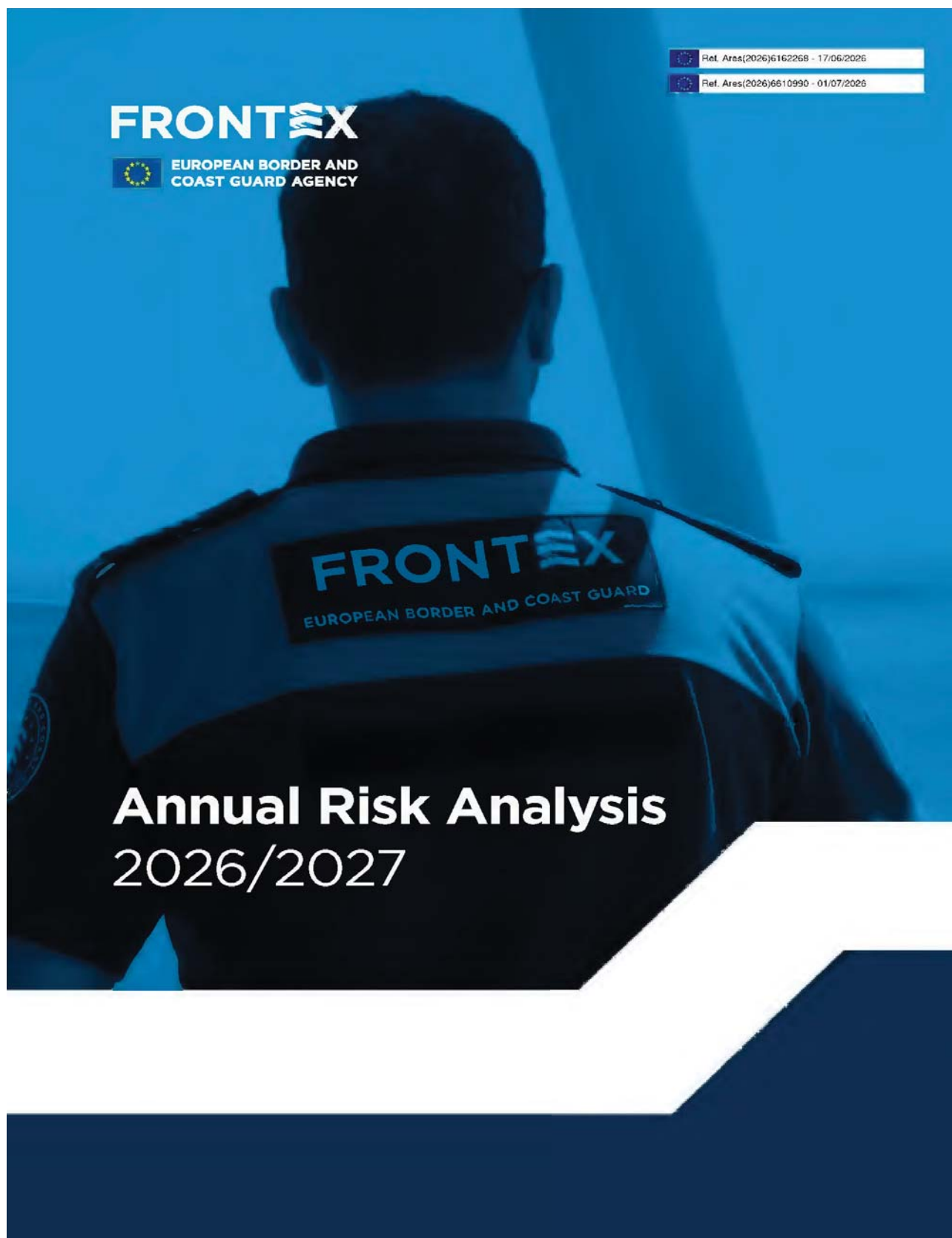
NOTE

From: General Secretariat of the Council

To: Working Party on Frontiers / Mixed Committee (EU-Iceland/Norway and Switzerland/Liechtenstein)

Subject: Frontex Annual Risk Analysis 2026/2027

Delegations will find attached Frontex's Annual Risk Analysis 2026/27.





FRONT**X**



**EUROPEAN BORDER AND
COAST GUARD AGENCY**

Annual Risk Analysis

2026/2027



European Border and Coast Guard Agency – Frontex, 2026
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Abbreviations

APIS	Advance Passenger Information System
ARA	Annual Risk Analysis
ATV	airport transit visa
AUSSOM	African Union Support and Stabilization Mission in Somalia
BCP	border-crossing point
EES	Entry/Exit System
EEZ	Exclusive Economic Zone
EIBM	European Integrated Border Management
ETIAS	European Travel Information and Authorisation System
EU	European Union
EUROSUR	European Border Surveillance System
Frontex	European Border and Coast Guard Agency
GPS	global positioning system
IBC	illegal border-crossing
ISIS	Islamic State of Iraq and Syria
OCG	organised crime group
TCN	third-country national
UK	United Kingdom
UN	United Nations
US	United States of America

1. Foreword

In my three years leading Frontex, there is one question I have been asked more than any other: is the number of people arriving irregularly at Europe's external borders going up, or down? A decade on from the crisis of 2015–16, the focus is understandable, and the answer in recent years has been an encouraging one. Illegal border-crossings into the EU fell again in 2025, reaching the lowest level since 2021, with detections in the first quarter of 2026 down close to 40% year-on-year. The analysis in this report does not expect that trend to reverse.

However, I would caution against deriving too much comfort from a single figure. What this Annual Risk Analysis makes clear is that the numbers and the risk are no longer telling the same story.

The environment around our external borders has changed. The US/Israeli war on Iran has destabilised the wider Middle East. Russia's hybrid campaign, which now includes the instrumentalisation of migrants, GPS jamming, sabotage, and provocations with drones and balloons, is a sustained reality. It is no longer an occasional incident across our eastern borders and in the air domain. Criminal networks are better resourced, more geographically spread and quicker to adopt new technology than they were even a year ago. And we are navigating this while also implementing the largest transformation of our border infrastructure in decades. The Pact on Migration and Asylum, the Entry/Exit System (EES) and the European Travel Information and Authorisation System (ETIAS) are arriving within months of each other.

So, the picture is not one of pressure easing. It is one of pressure changing shape. Falling arrival figures sit alongside a far more challenging reality: the external border now operates within a wider grey zone of geopolitical contestation, where hostile actors work below the threshold of conventional war to undermine European security and stability.

Against this shifting landscape, the EU has been investing in its own preparedness: in internal security, in defence readiness, in the resilience of the Union as a whole. And as state actors increasingly exploit transnational criminal networks, people-smuggling operations and migration



flows to undermine European security, effective external border management has become a cornerstone of the Union's wider security and defence. The Annual Risk Analysis is an important part of Frontex's contribution to that shared planning effort, an evidence-based assessment of where the risks actually are, produced so that everyone responsible for European Integrated Border Management can plan on the basis of fact, not assumption.

But I also want to be clear about what this report is not. It is not a case for Frontex doing everything, everywhere. Our mandate is the external borders and support for returns: the front door and the back door of the system. There is an active discussion underway about what more the Agency might do. I have always believed that an organisation is strongest when it is clear about its task and does that task well, within its mandate, and with full respect for the rights and dignity of the people we encounter. That clarity is not a constraint on our effectiveness. It is a crucial part of why we are trusted with this work.

The year ahead will test the European border community in new ways. This analysis is offered as a tool to help us meet that test, soberly, and together.

Hans Leijtens
Executive Director

2. Executive summary

Major geopolitical escalations

In line with our forecast issued at the beginning of the year¹, irregular migration to Europe continues a pronounced decreasing trend established in 2023–2025, given the further expansion and deepening migration partnerships with key countries of transit and of origin. However, when it comes to geopolitical developments, the EU's neighbourhood in 2026 has witnessed major escalations in violence and insecurity which could have a severe impact on European Integrated Border Management (EIBM).

The most consequential is the US/Israeli war on Iran which escalated from sustained tensions into active conflict in late February 2026. This war has destabilised the entire Middle East. Current scenarios range from a negotiated settlement to geographical expansion of the war or to state collapse in Iran, possibly resulting in mass displacement. The conflict has already caused severe disruptions at air transit hubs in the Gulf region, hindering mobility, including of migrants from South Asia en route to North Africa and the EU. The rerouting of migratory flows is expected towards alternative transit points or non-EU countries from which onward entry is then attempted by land or sea. Regardless of the ultimate outcome of the conflict, forced returns of Afghans from both Iran and Pakistan will continue, which might lead to an intensification of the migratory inflow of Afghans on the Eastern Mediterranean route, mitigated to varying degrees by transit countries en route to Europe. Secondly, the stagflationary shock is being experienced throughout the world because the crisis is causing serious economic disruption and might lead to worsened instability in key countries of origin.

The spreading instability in the Sahel and the expansion of Russia's geopolitical footprint in Africa remain of utmost concern. The potential strategic recalibration of US engagement in Africa may widen the operational space available to Russia, its proxies as well as for jihadist networks across the Sahel and Horn of Africa. This may contribute to further regional displacement that could feed migration flows towards the EU's southern borders.

Libya's fragmented governance, combined with the world's largest active displacement crisis in Sudan and accelerating instability in the Horn of Africa, sustains structurally elevated migration pressure on the Central and, via eastern Libya, Eastern Mediterranean routes. In the absence of solid mitigation measures, this pressure shows no prospect of any meaningful reduction in 2026. The Libya-Crete corridor recorded a threefold increase in arrivals in 2025 and is expected to remain under high

pressure throughout 2026, driven by a large migrant stock already present in Libya.

Syria's transition offers a rare stabilising signal, reducing the formerly high pressure directed mostly to the Eastern Mediterranean. However, ISIS's growing operational tempo and the displacement crisis caused by Israel's attacks on Lebanon temper this optimism.

Russian hybrid pressure

Russia's sustained and intensifying hybrid campaign against the EU and its external borders represents a cross-cutting risk that simultaneously affects the eastern borders and the air domain. At the eastern borders, Russian intelligence operations are on a confirmed upward trajectory, accompanied by GPS jamming of Baltic Sea navigation, sabotage of border infrastructure, weather balloon provocations and the instrumentalisation of irregular migration flows on the EU's external borders with Belarus as a deliberate political tool. In the air domain, the hostile use of drones and weather balloons are causing airport and airspace closures with cascading effects on flight schedules and border-processing capacity.

As mentioned, the growing presence of Russia's Africa Corps in eastern Libya, Niger, Burkina Faso, Central African Republic and Mali is weakening regional counterterrorism capacity, enabling jihadist recruitment and creating the structural conditions for migration flows to be leveraged as geopolitical pressure instruments against the EU. Russia is also recruiting African nationals to support its Ukraine operations, deepening regional instability. The aggregate implication is a threat environment in which Russia could activate migration, criminal and kinetic pressure across multiple EU borders simultaneously, and in which the likelihood of escalation in the hybrid domain grows as long as the war in Ukraine continues.

New border IT: the transformation that comes with commensurate risks

Beyond the full implementation of the **EU Migration and Asylum Pact in June 2026**, the full rollout of the **Entry/Exit System (EES)** in April 2026, followed by the **European Travel Information and Authorisation System (ETIAS)** in October 2026, represents the most significant transformation of EIBM infrastructure in decades.

However, this transformation also carries a commensurate operational risk. Where Member State readiness, carrier preparedness and border-crossing point infrastructure are uneven, extended processing times, flight schedule

¹ Annual Brief 2025 – Outlook for 2026

disruptions and the invocation of partial suspension mechanisms under EU Regulation 2025/1534 are possible scenarios, especially during the peak summer travel season.

The implementation of the EES is expected to trigger an adaptive response from smuggling networks, therefore a surge in the use of false or fraudulently obtained documents can be expected. Likewise, there will likely be more cases of authentic documents being used by impostors. ETIAS may also influence travel patterns, particularly during the initial implementation phase, and in case carriers' procedures are not fully aligned with the new requirements. Such situations could have a significant impact on border checks, including pressure on second-line checks during the transitional phase of ETIAS and the grace period when pre-authorisation is not mandatory.

Cross-border crime

Organised criminal networks operating across the Western Balkans, the Western Mediterranean and the eastern borders are expanding in reach and sophistication, posing an escalating risk to border management personnel and the integrity of EU external borders. These networks are increasingly converging with migrant-smuggling operations, amplifying violence and evasion tactics. In the Western Balkans, criminal groups have established a direct operational presence in drug-producing countries, substantially increasing cocaine, heroin and cannabis volumes flowing into the EU.

The illicit trafficking of converted firearms, blank-firing weapons modified to fire live ammunition, often imported from Türkiye and the Western Balkans, is growing and feeding directly into armed migrant-smuggling networks. As a result, such weapons are increasingly being used against migrants, rival group, and law enforcement. Along the eastern borders, the diversion of military-grade weaponry from the war in Ukraine to organised criminal groups operating in the EU is currently assessed as a high-impact but moderate-likelihood risk as the weapons are needed in Ukraine. However, the threat picture could rapidly deteriorate in the case of a ceasefire.

In the Western Mediterranean, cocaine trafficking networks have restructured around West African redistribution hubs and are deploying semi-submersibles, autonomous vessels and low-altitude drones to bypass countermeasures. During the forecast period, the EU's external borders will face a criminal environment that is better resourced, more geographically distributed and more technologically adaptive than previously, demanding coordinated multi-agency responses that match the

criminals' level of sophistication. Overall, the external border environment is characterised by simultaneous geopolitical volatility, adaptive smuggling networks and increased pressure across multiple border sections.

Secondary movements

In 2025, secondary movements within the EU continued to reflect long-standing patterns, with migrants initially entering via the Central or Eastern Mediterranean routes or, increasingly, the Western Balkan corridor, often progressing onward to preferred destinations such as Germany, France and the Benelux countries. These movements are not only tied to illegal border-crossings but are also exacerbated by gaps in return procedures, where migrants subject to removal orders frequently evade enforcement by relocating to other Member States, particularly when faced with protracted legal processes or varying reception standards. The Western Balkan route remains a critical transit pathway, channelling migrants from Greece and air arrivals in Western Balkan countries through Croatia, Slovenia and northern Italy, while France acted as a key transit hub for flows originating in Italy and Spain. Nationality trends highlighted Afghans as the most detected group, despite a general decline, followed by Moroccans, Algerians, and Turks, with Syrians dropping to fifth place amid shifting migration dynamics. Meanwhile, North Africans and sub-Saharan dominated movements via France, and a notable rise in Bangladeshi and Egyptian migrants along the Western Balkans was linked to increased arrivals through the Libya-Crete corridor. Beyond irregular entries, secondary movements are further fuelled by migrants who entered legally on short-term visas or visa-free travel before transitioning into irregular status due to economic or legal pressures, underscoring the persistent challenges in managing intra-EU migration flows.

General assessment of policy developments and their impact on EIBM

Recent policy developments in third countries and EU Member States are reshaping migration routes, influencing smuggling dynamics and testing the resilience of Europe's border management frameworks. The interplay between restrictive border measures, legal migration pathways and regional cooperation initiatives will determine the EU's ability to manage irregular migration and uphold its humanitarian and security obligations. Against this backdrop, the imminent full implementation of the EU Migration and Asylum Pact in June 2026 adds a layer of urgency, as Member States grapple with preparedness gaps.

3. Introduction

The Frontex Annual Risk Analysis (ARA) 2026/2027 is a publicly available strategic risk analysis report that identifies the key risks to the external borders of the EU, based on a regional approach. Risks for EIBM in the air, land and sea domain are intertwined and multifaceted to the point of constituting a strategic and operational continuum between the internal and external security of the EU. EIBM intelligence is a pre-requisite for effective and cost efficient operations that are based on the best available data, enabling sound policy and decision-making by operational actors.

The ARA is exclusively focused on the main risks on entry to the EU, across thematic areas, within a time horizon of one year from the time of publication (Q3 2026–Q3 2027). Even though the Channel route on exit is outside the scope of this report, it has several implications for secondary movements and therefore for the EU's cooperation with third countries.

The Channel route is the final leg of secondary movements towards the UK, mainly involving migrants who arrived in the EU on the Eastern and Central Mediterranean routes (**Bangladeshis, Somalis, Pakistanis, Afghans, Sudanese, Yemenis**) and the Western Balkan route (**Turks, Egyptians, Afghans**). It is also used by migrants who arrived in the EU legally with visas for work or study or from visa-free countries.

The report offers conclusions on the main risks to inform policy and strategic decision-making. This analysis of **the escalation of the geopolitical landscape, cross-border crime, hybrid threats and operational risks deriving from the biggest transformation of EU migration and asylum management** provides a comprehensive overview of future threats and challenges that could jeopardise the security and smooth functioning of the EU's external borders.

4. Eastern borders

The EU's eastern borders face a structurally complex and adaptive threat environment over the next 12 months, shaped by the ongoing war in Ukraine and sustained Russian geopolitical pressure posing high-level risks to EIBM.

The situation along the EU's eastern borders involves risks across three interconnected domains: irregular migration, hybrid threats and cross-border crime. Absent a major security deterioration, no sudden mass displacement from Ukraine is anticipated. However, the sensitivity of structural migration to developments in Ukraine, intensifying hybrid operations and persistent criminal networks collectively demand sustained operational readiness, enhanced interagency coordination and continued investment in detection capabilities. Any progress in peace negotiations should not be mistaken for a reduction in the key risks identified. Negotiations are more likely to reshape existing dynamics than to eliminate their structural drivers, and a post-conflict transition would introduce new or more complex challenges.

The migratory trend on the EU-Ukrainian border is expected to remain stable but structurally sensitive throughout the next 12 months. The situation is highly contingent on three variables: battlefield developments, Ukraine's mobilisation policy and its socioeconomic conditions. In the absence of a major deterioration in the security environment, the prevailing movement patterns are expected to remain stable. Regular cross-border mobility, encompassing ongoing displacement and circular movements between Ukraine and EU Member

States, will continue at high volumes, reflecting the normalised patterns of the protracted conflict.

Illegal border-crossings (IBCs) are likely to remain the most significant form of migration-related incidents across the Eastern land borders, primarily driven by Ukrainian military-aged men attempting to avoid mobilisation. This dynamic is expected to persist as long as general mobilisation remains in force. Detection trends are projected to follow a consistent seasonal pattern: a gradual increase in spring, a summer peak driven by more permissive environmental conditions and a decline from late autumn onwards.

The main risk factor for the next 12 months is a potential sudden deterioration of the security environment linked to military escalation, large-scale infrastructure disruption or changes in mobilisation policy, which could temporarily alter the established patterns and require rapid operational adaptation under EIBM. Changes in mobilisation policy, security conditions and domestic economic resilience will remain the primary drivers shaping both regular and irregular movements. From the EIBM perspective, sustained operational flexibility will therefore remain essential to respond to potential fluctuations in passenger flows, mobilisation-driven unauthorised exits and cross-border crime. The implications of peace talks must also

be carefully monitored, as they will also influence mobility patterns and cross-border crime dynamics.

Hybrid threat activity originating from Russia and Belarus represents a growing and increasingly difficult challenge on the EU-Russian and EU-Belarusian borders. Russia has demonstrably intensified its operations across EU Member States and Schengen Associated Countries, and the overall likelihood of hybrid incidents is assessed to be on a sustained upward trajectory. The range of tactics observed includes provocative actions, sabotage of border infrastructure and other asymmetric pressure operations. There is no expectation that this activity will diminish while the Russian war in Ukraine continues. In the maritime domain, persistent disruption to GPS and satellite navigation signals in the Baltic Sea and Gulf of Finland is expected to continue. Russia relies on these jamming operations to conceal the locations of its oil export ports from air strikes or drone attacks, a pattern that will persist as long as the shadow fleet remains central to Russian oil revenues. The EU's response must include heightened maritime situational awareness, enhanced law enforcement and military cooperation, and a sustained naval presence in the Baltic to deter further incidents.

The persistence of smuggling activities involving weather balloons, regarded as acts of provocation, may lead to coordinated closures of EU airspace and BCPs bordering Belarus. The ongoing development of the East Shield defensive programme on the EU borders with Russia and Belarus foresees, among other things, reconnaissance and threat-detection systems as well as anti-drone deployments. If it also serves as a system to destroy weather balloons it may hinder such hybrid activities in the future.

Cross-border crime on the EU's eastern borders is assessed as adaptive, profit-driven and opportunistic rather than uniformly escalating. Economic disparity, wartime conditions, sustained cross-border mobility and the agility of organised criminal groups in responding to enforcement measures are the principal drivers. The overriding challenge for EIBM will be to address increasingly sophisticated and diversified criminal methods rather than managing a sharp quantitative surge.

Instrumentalised migratory flows on the EU's border with Belarus will likely continue as long as they serve the political goals of Belarus and Russia.

Smuggling of cigarettes and other excise goods is likely to remain the most persistent crime area, given continued profitability and established networks. If IBCs fall under a stabilisation scenario, facilitators may direct increased capacities towards commodity smuggling. Methods of smuggling are expected to remain flexible, including concealment in vehicles and cargo, short distance drops and unmanned delivery tools.



Weapons trafficking into the EU is assessed as high-impact but currently moderate-likelihood. While Ukrainian countermeasures have limited large-scale diversion of military equipment, small-scale leakages and opportunistic smuggling remain a persistent risk, particularly in a scenario of intensified fighting or institutional strain.

Stolen vehicles, document and identity fraud, and the diversion of dual-use goods are expected to continue, especially if reconstruction-related trade increases. In Belarus and Russia, economic hardship and sanctions-related circumvention attempts may further stimulate illicit flows.

5. South-eastern borders

The South-East region faces a complex and volatile threat environment over the next 12 months, dominated by an armed conflict, regional instability, the consolidation of a new migration corridor, escalating cross-border crime and armed smuggling networks in the Western Balkans representing medium- to high-level risks to EIBM.

The most critical near-term development shaping migration and security across the South-East region is the US/Israeli war with Iran. This single variable introduces a wide range of possible outcomes in the forecast period, from a continuation of the current Iranian regime under a tense status quo, assessed as the more likely short- to medium-term scenario carrying a low to moderate migration impact, to a collapse of the state or descent into civil war. The results of state

collapse or civil war remain uncertain in the short to medium term but would carry the risk of large-scale displacement with highly significant consequences for the EU's external borders. Regardless of the ultimate outcome of the conflict, forced returns of Afghans from both Iran and Pakistan will continue, compounding the push factors Afghan nationals already under pressure from Pakistan-Afghanistan military escalations and persistent economic hardship within Afghanistan itself.



A protracted conflict or unstable stalemate could reverberate economically across the region, gradually increasing push factors for millions of foreign workers in the GCC in the medium to long term. Türkiye's focus on preventing renewed refugee flows into its territory, its reported efforts to secure its borders with Syria, Iraq and Iran, including contingency plans envisaging buffer zones in the event of major Iranian destabilisation, and a measured policy towards the large Syrian refugee population on its soil remain essential to manage the pressure on the Türkiye-EU migratory corridors in the medium term.

The situation in Syria continues to develop in a broadly positive direction, albeit with important residual uncertainties that require sustained monitoring. The transition process under the al-Sharaa government has made significant positive steps² and Syria's border management capacity is being progressively rebuilt, with measures preventing sea-bound departures already reported in 2025-2026. Residual uncertainties centre on ethnic and factional mistrust, competing regional interests and the risk of disorderly handovers of detention camps holding ISIS-affiliated individuals. The Islamic State maintains a low-level operational posture, exploiting security vacuums to rebuild and expand. Reports of former fighters escaping detention camps raise concerns about radicalised individuals moving towards the EU, sustaining a risk of terrorism, translated either into isolated attacks or into support for existing networks within the EU.

In Lebanon, the government's ban on Hezbollah military activities and phased disarmament measures are being actively resisted by armed factions. This has led to Israeli military action, population displacements and potential internal clashes that threaten to distract the authorities from border management, a critical function in preventing Eastern Mediterranean Sea crossings.

In Gaza, US-backed stabilisation plans could gradually improve the humanitarian situation, but Hamas' continued refusal to disarm and persistent regional tensions undermine prospects for full international engagement with peace measures. Egypt will nonetheless mitigate large-scale migration flows, even if limited onward movements occur, depending on policies at the Rafah crossing. Continuing Israeli military operations and settlement expansion in the West Bank feed regional tensions but are not expected to generate significant migratory outflows towards the EU in the near term.

The Libya-Crete corridor has consolidated as a structural and worsening pressure point. It saw a more than threefold increase in migrant arrivals in 2025 compared with 2024. Unless Libyan prevention capacities are significantly enhanced beyond the limited improvements observed in late 2025, pressure on this corridor is expected to remain elevated throughout 2026, driven by a high stock of migrants already in Libya, instability in Sudan generating onward movement, complex geopolitical dynamics including EEZ disputes, and easy access to Libya for certain nationalities that form traditional labour pools in the country.

Absent a major regional destabilisation or spillover from the US/Israel-Iran conflict, continued international diplomatic engagement driving positive progress in Syria, Gaza and Lebanon, combined with an enduring Turkish deterrent posture, should contain pressure on the main Eastern Mediterranean corridors. Nevertheless, the high level of geopolitical uncertainty means pressure upticks cannot be ruled out in the medium to long term. Traditional economic push factors such as hardship and dependency on foreign investment, lifting of sanctions in Syria, Lebanon, Afghanistan and Iran, will continue to will continue to follow seasonal patterns, with winter lows giving way to spring and summer rises before peaking in September and October.

Migration dynamics in the Western Balkans will continue to reflect Eastern Mediterranean developments with a delay. Certain nationalities will persist in misusing visa-free access to the Western Balkans including Turks, Chinese, Russians and Jordanian passport holders of Palestinian origin driven by deteriorating conditions at home or in search of economic opportunities. The overall pressure will be moderated by police operations, seasonality and the deterrent effect of smuggler violence and kidnappings.

The most acute operational security concern in the region is the escalating use of firearms by migrant-smuggling networks. Incidents involving armed smugglers targeting migrants, rival criminal organisations and law enforcement officers have become more frequent and are expected to continue. Strengthened border security, improved inter-agency coordination and enhanced rapid-response capabilities are therefore essential management priorities.

Organised crime groups (OCGs) in the Western Balkans have expanded their power and operational reach in recent years by cutting out intermediaries and establishing a

² Such steps include the largely peaceful takeover of power under international pressures / incentives to promote stability, the adoption of a transitional constitutional declaration (guaranteeing equal rights to all Syrians regardless of ethnic, religious or cultural background), the nomination of an interim government with representatives of Syrian minorities and the organisation of elections across most of the country, steps to integrate the SDF into Syrian institutions, a presidential decree recognising Kurdish language and culture and granting citizenship to Kurds, talks with Israel for a deconfliction mechanism in the south, etc.

direct presence in drug-producing countries, substantially increasing the volume of narcotics shipped to Europe. The region will remain a key transit zone for cocaine from Latin America, heroin from Afghanistan via Central Asia, and cannabis – for which several Western Balkan countries remain Europe's largest outdoor producers. Criminal organisations are additionally exploiting legal medicinal cannabis cultivation frameworks to supply illicit EU markets.

The illicit trafficking of converted firearms (blank-firing weapons imported from Türkiye and parts of the Western Balkans and modified to discharge live ammunition) represents a growing and structurally embedded threat, sustained by persistent regional instability. If trafficking volumes from Türkiye grow, these weapons are increasingly likely to reach migrant-smuggling networks operating across the region, further elevating the risk for law enforcement and migrants alike.

6. Southern borders

Migration pressures along the Central Mediterranean axis remain driven by a complex interplay of Libya's fragmented governance, persistent regional conflicts (particularly in Sudan and the Horn of Africa) and evolving geopolitical dynamics, creating conditions that sustain irregular migration and are expected to keep pressure on the EU's external borders high.

Migration flows in the Central Mediterranean remain elevated and, in the absence of solid mitigation measures, are expected to stay high throughout the forecast period. They are driven by three converging forces: Libya's fragmented governance, the world's largest active displacement crisis in Sudan and a rapidly destabilising Horn of Africa. Russia's expanding military presence in eastern Libya adds a significant hybrid dimension, raising the prospect that migration flows could be indirectly leveraged as a geopolitical instrument against the EU during periods of heightened tension. These dynamics together constitute the most consequential structural risk to the EU's southern borders in the coming 12 months, while also enabling the convergence of hybrid threats, organised criminal networks and other wider instability factors.

The Horn of Africa and Sudan continue to act as major drivers of displacement, feeding longer-term migration towards North Africa and Europe. The war in Sudan is the world's largest displacement crisis and increasingly functions as a latent pressure multiplier for the Central Mediterranean route. While Sudanese arrivals in the EU remain relatively low in absolute terms compared to other nationalities, the scale and duration of the displacement crisis – the largest globally – points to growing medium- and long-term risk. Sudanese refugees are accumulating in neighbouring countries, particularly Chad, Egypt and Libya, where overstretched host capacities and deteriorating living conditions are progressively increasing the likelihood of onward movement. Affordable smuggling fees, declining prospects in host countries and favourable maritime seasonal conditions could drive a gradual rise in Mediterranean crossing attempts in the coming year.

Strains in the Horn of Africa compound this picture significantly. Tensions between Ethiopia and Eritrea have intensified to the point of troop deployments, raising

concerns of a regional confrontation which, in the worst-case scenario, could trigger large-scale displacement, disrupt Red Sea security and generate secondary migration flows towards North Africa. Somalia remains fragile, marked by political fragmentation, persistent Al-Shabaab activity and growing uncertainty surrounding the effectiveness of the new African Union mission (AUSSOM). Geopolitical rivalries within the mission risk creating security vacuums exploitable by extremist groups. Islamic State-affiliated elements in Puntland, though numerically smaller than Al-Shabaab, add overlapping threat vectors encompassing terrorism, smuggling and informal taxation networks. The recognition of Somaliland's independence by Israel in December 2025 has deepened regional polarisation, drawing African and Middle Eastern powers into divergent policy positions in the Horn of Africa and heightening the risk of violence with potential spillover effects on Libya, Egypt and ultimately the Central Mediterranean route. Environmental pressures, particularly recurrent droughts and food insecurity are compounding these dynamics by accelerating rural displacement and weakening household resilience, amplifying conflict-related migration over time.

These regional pressures converge most visibly in Libya, which continues to function as the principal transit and departure hub for the Central Mediterranean. Smuggling networks exploit Libya's fragmented governance with different methods tailored to migrant profiles: Bangladeshi, Pakistani and Egyptian nationals are predominantly smuggled in faster, more costly boats, while sub-Saharan nationals are offered wooden or rubber vessels, accepting greater risk for lower fees. Libya's role has also expanded beyond maritime facilitation.

The growing use of air routes into eastern Libya has strengthened its position as a regional transit hub for migrants from South Asia and the Middle East, diversifying

access pathways. In 2026, arrivals from Libya are expected to remain at levels broadly similar to 2025, with the likelihood of structural improvement currently assessed as limited, unless substantive EU-Libya agreements on migration management are concluded.

Russia's expanding presence in eastern Libya through the Africa Corps reinforces Moscow's foothold in Libyan National Army-controlled territory and introduces a strategic layer of risk that goes beyond migration management. Additionally, Russia's growing military footprint across the Sahel, particularly in Niger and Mali, is weakening past counterterrorism efforts, fuelling violence and amplifying jihadist recruitment, while simultaneously positioning Moscow to leverage migration dynamics for geopolitical purposes against the EU.

Doubts over sustained US engagement in Africa – amid a strategic pivot toward the Middle East, Indo-Pacific and the Arctic – risk further widening the operational

space available to both jihadist actors and Russian-backed forces.

As the war in Ukraine continues and Russian forces sustain heavy casualties, Moscow's presence in Africa may increasingly serve as a source of manpower for both conventional and deniable forces. This could allow Russia to rebuild combat capacity over time and maintain its ability to project influence in Africa and beyond.

Since 2023 Egypt has evolved from primarily a country of origin into a major refugee-hosting and transit state, but has maintained a strong commitment to preventing irregular maritime departures. There have been no direct sea departures from Egypt to Europe for several consecutive years. Despite this, Egyptians remain the second-highest nationality detected at the EU's external borders after Bangladeshis, reflecting the complexity of overland and onward movement patterns, which enforcement of coastal departures alone cannot fully address.



7. South-western borders

The South-West region faces volatile but manageable migration flows in 2026. Instability in the Sahel and Russian proxy activity are considered as key push factors, while increasingly sophisticated drug trafficking networks are rapidly adapting methods to circumvent enforcement, presenting medium-level risks to the EU's south-western borders.

Migratory pressure towards the Canary Islands is expected to remain volatile over the next 12 months, with fluctuations largely driven by enforcement measures in the embarkation countries, regional instability in West Africa and the Sahel, and adaptive strategies of smuggling networks. The most significant development in the region is the structural shift in departure patterns on the Western African route following a sharp 60% decline in arrivals on the Canary Islands in 2025.

Intensified cooperation between the authorities of Spain, the EU and key West African states successfully suppressed departures from Mauritania, Morocco and Senegal, but smuggling networks responded by moving operations southward to The Gambia and Guinea, resulting in journeys made in poorly equipped, overcrowded vessels exceeding 2 000 km and lasting more than 10 days.

The underlying drivers such as demographic pressure, youth unemployment, instability in the Sahel and environmental stress remain unchanged, meaning that the 2025 reduction is fragile and contingent on maintaining strong enforcement. The most probable scenario for the forecast period is moderate but volatile pressure toward the Canary Islands, with episodic spikes during favourable weather and a significant risk of rebound if enforcement capacity weakens or smuggling networks successfully adapt to controls. Enhanced prevention measures in Mauritania, Morocco and Senegal are likely to remain in place, but their primary effect may be to diversify departure points as organised criminal groups adapt their operations.

On the Western Mediterranean route, a steady and slightly upward trend is expected to continue in 2026. The most notable development is the growing use of the longer and more hazardous Algeria-to-Balearic Islands corridor, increasingly favoured by Somali, Malian and Guinean migrants, nationalities previously more associated with the Central Mediterranean and Western African routes. This shift is directly linked to tightened enforcement in Libya, Tunisia and Mauritania, which is redirecting flows towards Algeria as an alternative departure point.

Algeria itself is both an origin and transit country, with Algerians comprising nearly 54% of detections on the Western Mediterranean route in 2025, a proportion expected to continue in 2026, sustained by structural youth unemployment and public dissatisfaction with the

political establishment, which may intensify ahead of the 2026 parliamentary elections. The limited rate of returns of Algerian nationals from EU countries continues to act as an additional pull factor. Algeria is also consolidating its regional influence across West Africa and the Sahel, though this is unlikely in the short term to significantly alter migratory flows towards the EU.

Morocco also remains a key departure and transit country for irregular migrants towards the EU. While pressure at Moroccan sea borders remains relatively limited, crossing the land borders with the Spanish exclaves of Ceuta and Melilla has become a viable route, with increased attempts indicating a significant migrant presence in Moroccan territory. This method usually requires limited facilitation from smuggling networks and remains relatively inexpensive, making it attractive for both Moroccan and sub-Saharan migrants. The consolidated partnership between Morocco and the EU will most likely address this threat as well, with border surveillance measures expected to be strengthened at the borders of Ceuta and Melilla, not only at sea borders.

Moroccan prevention activities along the Atlantic and Mediterranean coasts are deterring irregular departures, affecting migrant flows. As smuggling networks become less accessible and fees increase, some Moroccan migrants are seeking alternative routes, including via Algeria or Tunisia. The strict measures taken by the Moroccan authorities are expected to remain in place as long as Morocco's political relationship with the EU remains at the same level.

Regional dynamics may also influence migration flows. Discussions on Western Sahara between Morocco and Algeria are expected to continue in 2026 under joint facilitation by the US and the United Nations. While migration could theoretically be used as diplomatic leverage, this appears unlikely following the adoption of UN Security Council Resolution 2797 in October 2025 endorsing Morocco's autonomy proposal as a basis for negotiations.

Regional instability in the Sahel and Sudan is sustaining medium- to long-term migration pressure on the Western Mediterranean route. Sudan's conflict has displaced nearly 4.2 million people into neighbouring countries, including approximately 550 000 into Libya, generating secondary

migration movements toward North Africa that are likely to affect onward flows to Spain over the coming years.

Russia's expanding footprint through armed proxies in Niger and Mali is fuelling violence, eroding past counterterrorism gains and enabling jihadist recruitment across the Sahel. On 25 April, JNIM carried out coordinated attacks across Mali and resulted in the death of the country's defence minister. JNIM has called on Malians to revolt against the junta and establish sharia law in the country. These developments may have significant impact on EIBM as the government vacuum would benefit OCGs in moving drugs, arms and irregular migrants through Mali and Niger towards Libya, or towards Mauritania aiming for the EU. The situation can also lead to a refugee crisis increasing the pressure on the Western African route.

Russia is increasingly recruiting African nationals from the Sahel and neighbouring regions, including through coercive or deceptive practices, to support its military efforts in Ukraine, enabling Russia to regenerate combat power and project influence in Africa.

These converging dynamics such as insecurity, unemployment and weak governance are simultaneously generating displacement pressure and creating conditions

that could be exploited for the infiltration of migration flows by individuals posing internal security threats to the EU.

Cross-border crime on the Western Mediterranean route is escalating in both volume and sophistication. Cannabis smuggling from Morocco in high-speed boats (*narco-lanchas*) remains the dominant method and is expected to continue, with the same vessels increasingly used to carry cocaine arriving in Morocco overland from West Africa. Cocaine trafficking networks have restructured away from heavily surveilled northern European ports such as Rotterdam and Antwerp, transforming West Africa into a major offshore storage and redistribution hub, with product transferred to smaller vessels before entering the Western Mediterranean via the Canary Islands or going directly to the Andalusian coast, and then distributed inland along the Guadalquivir River. The use of semi-submersibles, autonomous vessels and fixed-wing drones flying at low altitude from the Moroccan coast toward the Cadiz area to evade radar is rising sharply and is expected to intensify. Growing coca production in Latin America combined with strong EU demand will increase drug volumes transiting Spain, placing intensifying pressure on law enforcement and demanding coordinated multi-agency responses.



8. Air borders and travel flows

EU air borders face a demanding 2026, defined by the complete rollout of the EES, an expected surge in irregular migration by Venezuelan nationals, hybrid threats and geopolitical developments in the Middle East and along the EU's eastern borders posing medium level risks to EIBM.

The most operationally consequential near-term developments at EU air borders are the reopening of Venezuelan airspace in February 2026, the full rollout of the EES in April 2026 and the ongoing crisis in the Middle East due to the US/Israeli war on Iran. The closure of Venezuelan airspace at the end of 2025 suppressed a significant migrant stock unable to depart by air. Venezuelans were already the highest asylum-claiming nationality in the EU in 2025 with approximately 90 000 applications, the overwhelming majority lodged in Spain. This may be further influenced by Spain's ongoing regularisation programme and restored air connectivity. A further acceleration is anticipated from Venezuelans removed from the United States under the current administration's restrictive measures who will seek to redirect to the EU.

The complete rollout of the EES may generate bottlenecks at major air BCPs, particularly during the peak summer season. The severity of disruption will depend heavily on the operational readiness of Member States, carrier preparedness and border infrastructure. Where readiness is uneven, extended waiting times and the possible invocation of partial suspension mechanisms under EU Regulation 2025/1534 cannot be ruled out.

The full implementation of the EES in April 2026 is also expected to have specific deterrent effects on the movement of irregular migrants both into and out of the Schengen area. However, migrant smuggling groups are likely to attempt to overcome the system, by using false or fraudulently obtained documents and the impostor *modus operandi*.

Overall, the level of irregular migration at EU air borders in 2026 is expected to remain broadly similar to 2025, but with important compositional and routing shifts due to geopolitical events. The US administration's restrictive measures targeting Latin American nationals are producing a displacement effect, redirecting flows toward EU entry points, with Venezuelan and other Latin American nationalities increasingly seeking asylum at EU airports.

Increases in asylum applications by Middle Eastern and Central Asian nationals are also anticipated. Gulf airports, which previously served as major transit hubs for Asian migrants bound for the EU, have been disrupted by the Middle East conflict. As a result, flows have rerouted towards alternative transit points or non-EU countries

from which onward entry is then attempted overland or by sea. Measures against Russia and Belarus continued to disrupt direct flight connections. Smuggling networks are highly adaptable and will continue adjusting to new enforcement measures, meaning border authorities must remain vigilant to changes in routing patterns and *modus operandi*.

Airport transit visa (ATV) waiver abuse is expected to remain a persistent *modus operandi*, with migrants exploiting transit at EU airports to claim asylum rather than continuing to ticketed non-EU destinations.

A significant number of irregular migrants of various nationalities travel by air on flights to the UK and Ireland in possession of false documents and fraudulently obtained passports or identity documents. Moreover, many impostors make use of other people's authentic travel documents. Irregular migrants often use their genuine passports to enter the non-Schengen departure areas of EU airports with a boarding pass for a flight to their home country or one where they can usually enter without a visa. They then use fraudulent documents to board a flight to a UK or Irish airport. This will likely continue at high levels during the forecast period, given the fact that both the UK and Ireland will remain key destination countries for migrants transiting the EU.

Visa policy misalignment in the Western Balkans continues to facilitate the use of air routes into states neighbouring the EU as a stepping stone for onward irregular entry.

The launch of ETIAS in October is likely to have less of an impact on passenger volumes than the EES, as it primarily establishes pre-travel authorisation required for entering the Schengen area. Nevertheless, ETIAS may still influence travel patterns, particularly during the initial implementation phase and if carriers' procedures are not fully aligned with the new requirements. Such situations could have a significant impact on border checks, including pressure on the second line during the ETIAS transitional phase and grace period when pre-authorisation will not always be mandatory.

Hybrid threats at the EU's air borders are growing and diversifying. State-sponsored instrumentalisation of irregular migration remains at an elevated risk given the current geopolitical environment and the demonstrated willingness of state actors to weaponise migration. Airport and airspace closures caused by drone intrusions

linked to Russian hybrid warfare are another operational concern, potentially disrupting flight schedules.

In terms of regular passenger flows, air travel, which accounts for approximately 70% of all EU arrivals, is

expected to grow, driven by demand from Western Asia and North America, with France, Spain and Italy being the most affected. Events in the Middle East are disrupting airspace, rerouting Asia-Europe flights and increasing fuel costs which are feeding through to ticket prices.

9. Return operations

In 2025, the number of return decisions issued across the EU increased by 5% on 2024 to a total of approximately 490 000. While return decisions significantly outnumber effective returns (thus generating a growing backlog of return cases), the number of effectively returned persons has been steadily increasing over the past five years (since 2021). In fact, in 2025 the number of effective returns rose by 10.5% in relation to 2024 and by 110% when compared with 2020.

Nationals of North African countries received the highest number of return decisions (22% of the total); however, the share of effective returns to this region was smaller, accounting for some 10%. A similar trend is visible for several countries in Western, Eastern and Central Africa, where returns are hindered by various challenges, including limited cooperation on identification and documentation.

By contrast, effective returns to Western Asia, particularly Türkiye, Georgia and Iraq, account for 27% of all effective returns, despite only 19% of return decisions being issued to nationals of this region. Similarly, a higher number of effective returns has been recorded to countries to the east of the EU (e.g. Moldova, Ukraine) and of the Western Balkans (Albania, Bosnia and Herzegovina, North Macedonia) due to their geographical proximity and better cooperation on return matters.

Between 2020 and 2025, voluntary returns were the most common type of return from the EU, accounting for approximately 56–60% of all effective returns, while 38–42% required enforcement. Although the overall number of effective returns more than doubled during this period (from 73 000 in 2020 to 151 000 in 2025), the ratio of voluntary to forced returns remained around 60:40. In contrast, Frontex support showed a clear and sustained shift towards voluntary returns, with the proportion increasing from 38% in 2022 to 63% in 2025. In recent years, Frontex's assistance to Member States has grown steadily also in terms of other return-related activities, e.g. the EU Reintegration Programme as well as return and reintegration counselling.

Regarding visa regimes, in 2025, about 60% of effective returns involved nationals of countries that require a visa to enter the EU, while the other 40% concerned visa-free countries. There appears to be only a small difference in the type of returns (voluntary vs forced) between visa-free

and visa-required countries. For instance, some 60% of returns to visa-free countries are voluntary, while the figure for visa-required countries is 57%. This suggests that the visa regime alone does not impact the type of return.

Despite the decrease in several migration indicators in 2025 (e.g. asylum applications are down 36%, and IBCs fell by 28%), the pressure to ensure the effective functioning of the return management system remains significant, as reflected by the increasing number of return decisions. In addition, ongoing geopolitical instability in the EU's neighbourhood will continue to impact migratory dynamics, potentially generating renewed or shifting pressure on specific migration routes. The return situation is also influenced by legal migration flows, secondary movements within the EU, outcomes of the asylum process and other factors shaping migration.

From mid-2026, return processes in the EU are expected to be shaped by the return border procedure under the new Pact on Migration and Asylum. The procedure focuses on returns of third-country nationals who were intercepted at the EU's external border and receive negative asylum decisions. Baseline flow analysis and caseload modelling suggests that Italy, Spain, Greece and, to a lesser extent, Croatia, Cyprus and Bulgaria will be the most impacted by the new measures, as 90–92% of IBCs involving TCNs with an EU-wide asylum recognition rate of 20% or less occur at these countries' external borders. In terms of nationalities, the return border procedure is likely to be applied to irregular migrants from Bangladesh, Egypt, Algeria, Morocco, Senegal, Pakistan, Türkiye, The Gambia, Tunisia, Nigeria and Sierra Leone.

Additionally, new legislative proposals concerning the EU return framework – namely the return regulation and the proposal for a common return system – are likely to shape the return landscape in the coming years. Expected changes to Frontex's mandate may also affect the way the Agency supports Member States in the implementation of EU return policy measures in the future.

In summary, the planned legislative and procedural changes as well as the collective effort of EU Member States and other partners, such as Frontex, are expected to contribute to a gradual but steady increase in the number of effective returns from the EU, in line with trends witnessed in recent years.

10. Secondary movements

Secondary movements within the EU remain driven by irregular entries, ineffective returns and disparities in asylum conditions, with Afghans, Moroccans and North/sub-Saharan Africans dominating flows, while legal entrants transitioning to irregular status further complicate enforcement.

Secondary movements have been traditionally aligned with illegal border-crossing patterns. Migrants entering the EU on the Central or Eastern Mediterranean route frequently later engage in secondary movements towards their desired destinations in western and northern Europe, notably Germany, France and the Benelux region. At the same time, the Western Balkan route functions as both an entry and transit corridor, while the Western Mediterranean and Western African routes sustained steady movements towards France and Belgium.

Secondary movements are not driven solely by irregular entries. Another contributing factor is the **limited effectiveness of return implementation** – attributable both to internal constraints and external cooperation challenges, which facilitate repeated and circular movements across different Member States. Secondary movements can be considered both a cause and a consequence of ineffective return systems. On the one hand, individuals issued with a return decision but not detained often abscond before enforcement, moving to another EU country, particularly if they anticipate a lengthy legal process. On the other hand, variations in protection procedures, reception conditions and personal preferences can incentivise migrants to continue their journey, so by the time the authorities attempt to execute a return decision, the individual has already left the country.

The main corridors of secondary movements for irregular migrants in the EU remained unchanged. The **Western Balkan** land route via Croatia, Slovenia and northern Italy funnelled migrants that had arrived in Greece by sea and overland and those who had arrived in Western Balkan EU neighbouring countries by air. As for destination countries, France received stable flows from Italy (comprising Western Balkan flows and sea arrivals in Italy) and from Spain (stemming from Western Mediterranean and Western African routes).

Germany remained the main destination country in 2025, with roughly one-third of all EU/Schengen-wide reported secondary movements. France was the **main transit country** for secondary movements into Germany, showing stable migratory pressure, followed by Austria, Poland and Switzerland.

On the eastern flank of the EU, the reintroduction of border controls by Poland at the Lithuanian border in July 2025 contributed to a growing number of attempts of unauthorised intra-Schengen travel from Baltic airports, mostly from Riga, but increasingly also from Tallinn and Vilnius.

Afghan was the top migrant nationality in 2025 – despite an overall decrease, their number remains high. The number of **Syrian** migrants detected on secondary movement across the EU/Schengen area has been steadily declining, making them only the fifth largest nationality, behind Afghans, Moroccans, Algerians and Turks.

North Africans (Algerians, Moroccans and Tunisians) followed by sub-Saharan (Sudanese, Egyptians, Malians, Guineans) were the main nationality groups of migrants detected on the flow via France. Afghans, Egyptians, Bangladeshi and Moroccans topped the Western Balkan route. A significant increase of Bangladeshis and Egyptians in Western Balkan secondary movement flows was linked to the spike in arrivals of those nationalities via the Libya-Crete corridor.

Besides illegal border-crossings, secondary movements are also fuelled by **migrants who legally arrive in the EU** (for short-term work, on student or tourist visas or because they came from visa-free countries) but who, due to various legal, economic and personal circumstances, end up travelling through the EU illegally.

11. General assessment of policy developments and their impact on EIBM

Recent policy developments in third countries and EU Member States are reshaping migration routes, influencing smuggling dynamics and testing the resilience of Europe's border management frameworks. The interplay between restrictive border measures, legal migration pathways and regional cooperation initiatives will determine the EU's ability to manage irregular migration and uphold its humanitarian and security obligations. Against this backdrop, the imminent full implementation of the EU Pact on Migration and Asylum in June 2026 adds a layer of urgency, as Member States grapple with preparedness gaps.

This chapter focuses on the most significant policy developments in specific African countries that can have a direct impact on EIBM in the forecast period, in addition to what is included in the regional chapters. In West and North Africa, **Nigeria's** revised National Migration Policy (April 2025) and the expansion of Advance Passenger Information Systems (APIs), e-gates and automated e-visas represent a significant step toward modernising migration governance.³ These reforms enhance pre-arrival screening, identity verification and document fraud detection, aligning with EU priorities for data-driven cooperation on returns and counter-smuggling. If fully implemented, these measures could strengthen EU-Nigeria collaboration, though their operational impact depends on technical capacity and interoperability with European systems. The long-term effect on EIBM may be positive, provided that capacity-building support accompanies these technological advancements.

In stark contrast, **Niger's** repeal of Law 2015-36 – the cornerstone of EU-Niger migration cooperation – has led to the resurgence of the Agadez corridor as a key transit hub for irregular migration towards Libya. The **Alliance of Sahel States'** February 2026 roadmap, which frames migration governance as a matter of domestic sovereignty, has effectively excluded EU-compatible cooperation.⁴ With over 384 000 migrant movements recorded in March 2026 and the repatriation of 497

stranded Nigerian migrants from Agadez in May, the corridor's reactivation poses a direct challenge to EIBM.

Libya's unified national budget (April 2026) – the first in over a decade – offers cautious optimism for institutional stability⁵, which could eventually support more coherent border and coast guard policies. However, the risk of renewed factional clashes remains, particularly in key coastal cities such as Tripoli, Zuwara and Benghazi, where instability could create opportunities for smugglers. The voluntary return programme for Sudanese nationals, targeting 1 000 returnees, provides only marginal relief given the 560 000 Sudanese migrants currently staying in Libya. Meanwhile, the conflict in Sudan continues to displace millions into neighbouring countries, sustaining migration movements towards North Africa and, ultimately, Europe. The Libya-Sudan axis is thus expected to remain a critical migration pathway in the short to medium term.

Egypt's new asylum law (Law No. 164 of 2024) and its strategic partnership with the EU present both opportunities and challenges for EIBM. The law establishes a domestic asylum framework, which could facilitate deeper EU-Egypt cooperation on border management, anti-smuggling and returns.⁶ However, its effectiveness will depend on implementation quality; overly restrictive procedures complicate cooperation. A more significant development is Egypt's implementation of mandatory transit visas for Bangladeshi citizens and the potential introduction of transit visa requirements for Pakistani nationals, a measure encouraged by the European Commission to disrupt irregular migration routes to Libya. If enforced effectively, this may reduce migration pressure on the Central Mediterranean route. However, there is a risk that migrants may reroute through alternative transit countries, such as Türkiye or Belarus, or exploit other connections to reach Libya. The success of this initiative will thus depend on Egypt's willingness to cooperate and the EU's ability to monitor and adapt to shifting migration patterns.

³ <https://migrationstudies.unizik.edu.ng/validation-of-the-reviewed-national-migration-policy-nmp/>

⁴ **Niger** – Population Flow Monitoring Report 98 (March 2026) | Displacement Tracking Matrix

⁵ **Joint Statement on Libya Unified Budget Agreement** - United States Department of State

⁶ <https://www.refworld.org/legal/natlegcomments/unhcr/2025/en/150248>; https://enlargement.ec.europa.eu/news/joint-declaration-strategic-and-comprehensive-partnership-between-arab-republic-egypt-and-europe-2024-03-17_en

In **Tunisia**, the February 2026 citizenship ban for irregular migrants and their children, which was framed as a measure to maintain 'demographic balance', has institutionalised the marginalisation of migrant communities. By denying integration pathways, this policy risks pushing more migrants towards the Central Mediterranean route, reinforcing Tunisia's role as a transit rather than destination country. The long-term effect may be to deepen migrant precarity, reduce incentives to remain in Tunisia and encourage onward movement to Europe. This aligns with broader trends in North Africa, where restrictive policies often displace rather than deter migration, ultimately sustaining pressure on the EU's external borders.

Italy's 2026–2028 Flow Decree represents a significant expansion of legal migration channels, allowing 497 550 non-EU workers to enter the country over three years, representing a 6% increase compared with the previous decree.⁷ The policy prioritises nationals from 37 designated countries, many of which are major sources of irregular migration, including Nigeria, Egypt, Pakistan and Tunisia. By offering regulated entry for labour migrants, Italy aims to address its severe labour shortages while simultaneously reducing the arrival of irregular (mainly economic) migrants. If successful, this approach could gradually reduce pressure on the Central Mediterranean route by providing a viable alternative to perilous sea crossings. However, its long-term impact will depend on the effective integration of arriving workers and the enforcement of return policies for those who do not qualify for legal stay.

Spain's regularisation process, while primarily designed as an internal administrative measure to reduce irregularity, address labour-market needs and ease pressure on national systems, might influence migration dynamics at both national and EU level, as smuggling networks may exploit the initiative to incentivise larger migratory flows to the EU. This is particularly concerning given the ongoing instability in the Sahel, which has displaced 4.2 million people into neighbouring countries, including 550 000 into Libya. Further migratory movements towards the Western Mediterranean route are likely in the coming years.

The English Channel route remains one of the most pressing challenges for European border management, with 60 000 irregular crossing attempts recorded annually and a 60% success rate so far in 2026. Despite the **UK's** efforts to deter crossings, including the renewal of the Sandhurst Agreement with **France**, the route's attractiveness persists. The updated agreement,

which extends bilateral cooperation for another three years, introduces performance-based funding – tying a quarter of the UK's EUR 766 million contribution to measurable outcomes in reducing crossings. It also includes the deployment of 1400 additional French law-enforcement personnel and the construction of a new detention centre in Loon-Plage to facilitate returns. So far, these measures have contributed to a 44% decrease in crossings compared to early 2025. The low number of returns from the UK further sustains the route's viability, as successful crossings reinforce its reputation as a viable option for migrants unable to regularise their status in the EU.

In Eastern Europe, hybrid pressures from Belarus and Russia continue to drive a securitised border response among EU Member States. **Poland**, **Lithuania** and **Latvia** have maintained or expanded emergency measures, including enhanced surveillance, physical barriers and counter-drone technologies, to combat hybrid threats such as smuggling balloons and instrumentalised border crossings. Poland's suspension of asylum for illegal entrants and the extension of its border buffer zone reflect a broader trend of restrictive border policies, while **Estonia** and **Finland** have tightened entry conditions, including bans on non-biometric Russian passports. The EU's 20th sanctions package against Russia, which further restricts visa access and targets sanctions circumvention, complements these measures by reducing the risk of visa misuse for irregular migration. While these policies have been effective in curbing immediate threats, they may also push migrants towards more dangerous routes or increase reliance on alternative transit points, such as the Western Balkans, where visa policy alignment remains incomplete.

As the June 2026 deadline for the full implementation of the Pact on Migration and Asylum approaches, the tension between the Schengen ideal of free movement and the political realities of border security has never been more acute. The expansion of Schengen in January 2025 to encompass **Bulgaria** and **Romania** marked a rare moment of progress. Yet this achievement has been overshadowed by a broader trend: the systematic reintroduction of internal border controls across the bloc, driven by rising migration pressures and security concerns.⁸

In mid-2026, 11 Schengen states have active internal border checks in place. **Austria**, **Denmark**, and **Switzerland** will maintain controls until mid-summer, while **France**, **Germany**, **Italy**, **Norway**, the **Netherlands**, **Poland**, **Slovenia** and **Sweden** have extended theirs into late 2026. The justifications vary from unprecedented

⁷ <https://prefettura.interno.gov.it/it/prefettura/spezia/decreto-flussi-2023-2025>

⁸ <https://carnegieendowment.org/europe/strategic-europe/2025/01/despite-schengens-expansion-europes-borders-are-hardening>

irregular migration flows to terrorism risks and rising antisemitic incidents. The Netherlands, meanwhile, explicitly targets cross-border smuggling networks operating along its Belgian and German frontiers and along intra-Schengen air borders. Even Germany, which briefly lifted its land border checkpoints in March 2026 after months of enforcement, has since reinstated them – a clear sign of rapidly shifting policy priorities.⁹

Poland's decision to extend controls along its borders with Germany and Lithuania until October 2026 further underscores the fragmentation within Schengen. Poland's rationale about preventing westward movement of migrants within the EU reflects broader anxieties about secondary movements and the effectiveness of external border protections.¹⁰

With the formal implementation of the Pact on Migration and Asylum beginning on 12 June 2026, the disparities in Member State preparedness are stark. As of April, only 11 countries reported that they were completely ready to integrate into the new system, while nine had not even begun critical business process testing. A mere 15 Member States have the necessary reception facilities and staffing to implement the mandatory screening and asylum border procedures, which are a cornerstone of the Pact's design. Pilot exercises in Lampedusa, Sicily, Lisbon airport and Romania's land borders revealed a persistent challenge: how to prevent migrants from absconding before processing – an issue the European Commission has flagged as a top priority for resolution before the June deadline.¹¹

The 2026 Annual Solidarity Pool sets a target of 21 000 relocations or equivalent support, backed by EUR 420 million in financial contributions, primarily directed towards the Member States facing the most severe migratory pressures, namely **Cyprus, Greece, Italy and Spain**.¹² It is a key pillar of the Pact, which has seen near-universal participation, with Hungary and Slovakia as the sole holdouts. However, six other Member States are identified as eligible to seek full or partial exemption from the Solidarity Pool as they 'face a significant migratory situation because of the cumulative pressures of the last five years'. **Austria, Bulgaria, Croatia, Czechia, Estonia and Poland** have the possibility to request a full or partial deduction from their contributions and most of these countries have already requested the exemption.¹³

Frontex's operational requirements have surged by 29% due to maritime challenges, yet Member State contributions to border staffing have remained stagnant since 2023. This has prompted discussions about future resourcing needs, with proposals to triple the Standing Corps to 30 000 personnel over time. A formal amendment of Frontex's mandate is expected later in 2026, reflecting the escalating demands on Europe's border management infrastructure.

Strategic challenges and the way forward

The global landscape is characterised by geopolitical turbulence and security flashpoints. These are major drivers of migration and cause concerns for the EU as described earlier in the report. They present three critical challenges for EU institutions and Member States:

- 1. Balancing Schengen's core principles with national security imperatives:** The proliferation of internal border controls risks eroding the area of free movement of persons. However, Member States face immediate political and operational pressures that make a return to open borders difficult. A coordinated strategy is needed to reconcile free movement with effective migration management, possibly through enhanced external border protections and deeper Frontex engagement.
- 2. Ensuring uniform implementation of the Pact:** The wide gap in preparedness between Member States is a major concern. The EU should prioritise targeted support for lagging countries, particularly in infrastructure, training and digital systems, to avoid a multi-tiered implementation that could undermine the Pact's credibility.
- 3. Sustaining political and financial solidarity:** While the Solidarity Mechanism has seen broad uptake, the reluctance of Hungary and Slovakia signals potential fractures. Maintaining cohesion on relocation quotas and financial contributions will be essential, particularly as migratory pressures evolve. The EUR 420 million pool is a start, but longer-term funding and burden-sharing mechanisms may be required to ensure sustainability.

⁹ Temporary Reintroduction of Border Control - Migration and Home Affairs

¹⁰ <https://etias.com/articles/poland-extends-border-checks-with-germany-lithuania-to-october>

¹¹ <https://etias.com/articles/eu-migration-pact-where-things-stand-before-june>

¹² [8a0aa873-859c-48b4-9f14-29674238393a_en](https://etias.com/articles/eu-migration-pact-where-things-stand-before-june)

¹³ <https://www.euronews.com/my-europe/2025/12/06/eu-members-seek-fewer-solidarity-pool-relocations-of-asylum-seekers-from-states-under-pres>

12. Outlook

The aggregate outlook is one in which EIBM will be required to continuously adjust to geopolitical changes, implement its most complex technological transformation to date and maintain operational effectiveness across all border domains. Sustained operational flexibility, accelerated interagency coordination and proactive contingency planning are the three most urgent management imperatives for the period ahead.

Geopolitical shifts and the migratory flow

Migratory pressure on the EU-Ukraine border is expected to remain manageable but structurally sensitive to developments related to the war and internal dynamics within Ukraine. In the absence of a major deterioration in the security environment, no sudden large-scale displacement from Ukraine towards the EU is anticipated over the next 12 months. However, the situation remains highly contingent on battlefield developments, mobilisation policies and domestic socioeconomic conditions.

Overall, migration in South-Eastern Europe will continue to be affected by developments in traditional source regions, i.e. the Middle East and South-Central Asia, as well as by developments along the corridors via Libya. The US/Israeli war on Iran and relations between various groups and factions in Lebanon, Gaza and Syria remain key uncertainties which can still drive instability, ranging from localised skirmishes to potential regional conflicts. With the above caveats, absent a major regional destabilisation, and provided Türkiye continues to focus on preventing migratory spillovers, pressure on the Türkiye-EU corridors should be kept under control for the medium term. Still, given high geopolitical uncertainties, pressure upticks cannot be ruled out in the medium to long term. Unless Libyan prevention capabilities are significantly enhanced, pressure on this corridor is expected to remain high throughout 2026. Migration dynamics in the Western Balkans will continue to reflect, with some delay, developments in the Eastern Mediterranean and the key source and transit areas.

Regional tensions in the Horn of Africa and the war in Sudan continue to act as major drivers of displacement, feeding longer-term migration pressure towards North Africa and Europe, with Libya remaining the principal transit and departure point for the Central Mediterranean route.

Migratory pressure on the Canary Islands is expected to remain moderate but changeable over the next 12 months, with episodic spikes, particularly during favourable weather. The main drivers of migratory pressure on this route are enforcement measures in the embarkation countries, regional instability in West Africa and the Sahel, and adaptive strategies by smuggling networks. While annual arrivals may remain below the exceptional levels of 2024, they could increase in relation to the lower levels observed in 2025 if enforcement measures weaken or smuggling networks successfully adapt to controls. The Western Mediterranean route is expected to see a steady flow of migrants, with a slight upward trend.

The number of irregular migrants entering the EU by air in 2026 will likely be at levels similar to 2025. The number of irregular migrants of Latin American nationalities refused entry at EU airports will likely keep increasing in 2026. This is mostly due to measures introduced by the current US administration aimed at reducing irregular migration of Latin American nationals to the US. The number of asylum applications registered at the EU's external air borders by Middle Eastern and Central Asian nationals may also increase. Migrants trying to enter the EU in an unauthorised manner could, where possible, abuse the Airport Transit Visa waiver to seek asylum in the EU. Others might use false or fraudulently obtained documents or present someone else's authentic passports as impostors to board flights to the EU.

Future of hybrid threats

In 2026, hybrid threats will present a multi-domain challenge with a sustained upward trajectory. Along the eastern borders, Russia and Belarus will highly likely intensify their hybrid operations with tactics ranging from instrumentalised migration, infrastructure sabotage and GPS jamming to the hostile use of drones and weather balloons and asymmetric pressure operations to test detection and reaction capabilities. The need to strengthen response capacities by the EBCG community has never been more pertinent.

At air borders, state-sponsored instrumentalisation of migration and drone intrusions to disrupt air traffic will pose an elevated risk. On the southern and southern-western borders, Russia's expanding military footprint through the Africa Corps in the Sahel is weakening regional counterterrorism capacities, fuelling jihadist recruitment and positioning Moscow to potentially

leverage migration flows as a geopolitical instrument against the EU, should it serve its political interest.

The convergence of hybrid operations, organised criminal networks and regional instability is identified as one of the most consequential structural risks to the EU's southern borders. Across all domains, the shared assessment is clear: throughout the forecast period, hybrid threats are expected to diversify in method, may expand in geography and will harden in intent to make prevention and detection an increasing challenge for EIBM.

Operational risks

The rollout of the EES and ETIAS will fundamentally reshape EU border management. Ensuring full operational preparedness is non-negotiable, encompassing thorough training for border personnel, expanded processing infrastructure at key crossing points, and refined passenger flow management protocols designed to minimise disruption and maximise throughput efficiency. Sustaining strategic agility is equally essential, enabling rapid policy adaptation in response to shifting geopolitical dynamics and emerging security threats.

Cross-border crime

Cross-border crime across all EU border regions will remain adaptive, profit-driven and technologically evolving rather than uniformly escalating. Migrant smuggling remains the overriding challenge for border management across all routes, as OCGs increasingly integrate sophisticated diversified methods to counter enforcement efforts.

Along the eastern borders, cigarette and excise goods smuggling will remain the most persistent threat. Weapons trafficking is assessed as a high-impact but moderate-likelihood risk, unlikely to materialise unless the war in Ukraine de-escalates to the point of demobilisation of combatants and arms surpluses. Detections of stolen vehicles, document fraud and dual-use goods smuggling are expected to grow.

In the Western Balkans, OCGs will ensure the region maintains its status as the primary EU transit corridor

for cocaine, Afghan heroin and cannabis. Trafficking of converted firearms from Türkiye represents a growing risk. Along the Western Mediterranean, *narco-lanchas* carrying Moroccan cannabis will increasingly be used for transporting cocaine, as trafficking networks continue to restructure towards West African redistribution hubs, with semi-submersibles and fixed-wing drones representing the advancing technological frontier.

Across all routes, the overriding challenge for EIBM will be the pace of adaptation by OCGs as they increasingly apply sophisticated, diversified distribution methods. In the maritime domain, particularly across the Mediterranean, organised crime will increasingly exploit commercial ships, fishing vessels and ports, using container flows and concealed compartments in vehicles to facilitate the transport of illicit goods.

Frontex support for return activities

EU-wide effective returns will continue their gradual upward trajectory, but the structural gap between the number of issued return decisions and the number of actual returns will persist, sustained by the sizeable return backlog, volatile timeline, as well as challenges such as limited cooperation on identification and documentation from countries of origin.

The Agency's support for return operations has grown substantially in recent years, from 7 952 (11% of all effective returns) in 2020 to around 63 500 in 2025 (42% of all effective returns), and Frontex is expected to remain a key partner for Member States in the years to come.

The implementation of the EU Pact on Migration and Asylum as of June 2026 is expected to have a considerable impact on the total numbers of returns. However, the first results of the Pact will only be visible at the end of 2026, and the long-term effects will need to be measured in perspective of the overall migratory situational picture.

Legislative reforms on return regulation, return digitalisation and changes to Frontex's mandate are expected to lead to changes in overall EU returns as well as Frontex's role in the next two years.

Secondary movements

Secondary movements within the EU/Schengen area are structurally embedded in the EU's migration system and are projected to persist through 2026 and 2027. Even if irregular arrivals at external borders level off or moderately decrease, movements within the Schengen area will likely persist, as they are primarily driven by different socioeconomic opportunities, as well as differences in asylum procedures, reception conditions and return effectiveness in particular Member States. Policy reforms and enforcement measures may shape the scale and direction of these internal flows, but they will not fundamentally remove the underlying incentives.

The EU Pact on Migration and Asylum is anticipated to yield procedural harmonisation over the medium to long term, however, its near-term effect on secondary movement reduction will be negligible, particularly within the 2026 timeframe.

Geographically, the Western Balkan corridor – traversing Serbia, Bosnia and Herzegovina, and Croatia toward Slovenia and Austria – is likely to remain the dominant transit pathway for secondary flows originating from the Eastern Mediterranean, with intensity subject to variations based on enforcement measures.

Secondary movements linked to the Central Mediterranean and Western African/Western Mediterranean routes are directly correlated with arrival volumes in frontline Member States, given the high onward movement rate among those entering via these corridors. Consequently, fluctuations along these routes have a cascading effect on secondary movement distribution across the Schengen area.

Finally, the national composition of secondary movement flows is mainly mirroring the nationality profile of external border crossings, with the most frequently detected irregularly crossing nationalities accounting for the majority of internal detections.

Policy developments

The coming months will be decisive for the future of Schengen and the EU's migration framework. Success hinges on three key actions: accelerating operational readiness for the Pact, with a focus on screening capabilities and reception capacity; strengthening Frontex's role through mandate expansion and increased resourcing; and fostering political alignment to prevent the permanent normalisation of internal border controls, which would deal a severe blow to European integration.

The June deadline for the implementation of the EU Pact on Migration and Asylum is not just a technical milestone; it is a test of Europe's ability to unite behind a common approach to migration. Failure to deliver a functional, fair and sustainable system risks deepening divisions. On the other hand, success would reaffirm the EU's capacity to act collectively in the face of shared challenges, as reflected by the **'New border IT: the transformation that comes with commensurate risks'** section of the executive summary. The choices made today will shape Europe's security, cohesion and global standing for years to come.

Forward planning

To confront the accelerating complexity of the geopolitical environment, hybrid threats, cross-border crime, and the transformation of the EU's migration and asylum system, the EU must embrace a proactive and adaptive approach, anchored in predictive EIBM intelligence and a flexible operational response. This will enable the EU and its Member States to navigate a risk landscape dense with structural challenges and serious threats to the security of the external borders. A predictive approach must be built on access to comprehensive data sets, the complete operationalisation of EUROSUR functionalities, and robust mechanisms for processing and disseminating intelligence across a broad range of institutional actors and professional communities.

Strengthening border resilience must be treated as a strategic priority, requiring sustained investment in advanced surveillance technology, intelligence-sharing frameworks and targeted capacity-building programmes. Frontex understands that discussions are ongoing as to a possible supportive role of the Agency on the security of border infrastructure and in the development of countermeasures against hybrid operations targeting them.

In the domain of cooperation with third countries, deepening multilateral partnerships with North African and Western Balkan counterparts will be indispensable in dismantling the organised criminal networks involved in people smuggling and other cross-border crime.

The EU must reinforce its return architecture by better balancing the growing operational role of Frontex with robust and accountable national capabilities. This balanced approach will ensure that return operations remain effective, legally sound and consistent with

humanitarian obligations. By aligning operational readiness with long-term strategic foresight, the EU will be significantly better positioned to safeguard its borders while upholding its foundational commitments to security, human rights and regional stability.

Strategic Risk Analysis 2026: essential reading for a longer-term perspective

Looking beyond the year ahead, Frontex's Strategic Risk Analysis 2026, which is to be published in the second half of the year, will have a 10-year time horizon with scenarios for European Border Management up to 2036. The report will focus on megatrends, **such as increasing demographic imbalances, accelerating technological change, hyperconnectivity and widening inequalities** – to name a few – and will analyse the areas most relevant for border management. The report is designed to enable strategic, legislative and operational decisions to be taken to enhance border management in the longer term.



FRONTEx



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