



**GLOBAL
INITIATIVE**
AGAINST TRANSNATIONAL
ORGANIZED CRIME

WHEN IS DANGER DANGER AHEAD?

SCENARIOS FOR THE FUTURE OF ORGANIZED
CRIME IN THE WESTERN BALKANS

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INTRODUCTION: THE FUTURE OF ORGANIZED CRIME IN THE WESTERN BALKANS

Criminal actors and markets are agile, they adapt quickly and exploit emerging opportunities whereas police and policymakers tend to focus on the challenges of the day. In order to be better prepared to reduce the harms posed by organized crime and to disrupt criminal activities, it is useful to look over the horizon and anticipate and prepare for a range of eventualities.

Strategic foresight is a tool for guiding strategic thinking. It is a collective technique aimed at overcoming long-held views and cognitive biases, and helps groups and organizations to think about possible futures in a structured, methodical way. It is important to envisage futures in the plural because many trajectories may emerge. These are shaped by megatrends (explained below), but also conscious decisions, as well as chance.

It has been argued that the human brain does not recognize change, even when it is unfolding before our eyes: 'What has not been imagined will not be foreseen in [...] time.'¹ To improve the future literacy of decision-makers, strategic foresight relies on critical thinking, which enables us to question assumptions, validate observations, evaluate evidence, analyze arguments – in short, to engage in consistent, logical reasoning.

Thinking about how the future will look is not an end in itself. Insights gained through strategic foresight bring to the fore imperatives for change in the here and now. They inform decision-makers about the adjustments needed today to mitigate tomorrow's emerging risks and seize opportunities for the future. Conventional wisdom, by contrast, is the assumption that the future will follow a linear projection of past

experience, that change is incremental and that tomorrow will look a lot like yesterday, with some minor adjustments.

But as we have seen over the past 20 years or so, unforeseen path changes occur more than we may anticipate – from 9/11 to the Arab Spring, the financial crises, Russia's annexation of Crimea, the COVID-19 pandemic, the war in Ukraine and Hamas's attack on Israel. Indeed, dramatic and disruptive events shape our lives to such an extent that it can be difficult to design meaningful strategic plans that can guide decision-makers. As a result, policymaking in the contemporary world tends to be reactive and leaders seem to be in continual crisis management mode.

Under these conditions, how can strategic foresight help? Foresight is not about forecasting events or making predictions. Rather, it is about developing a collective mindset that the future may be very different from what we have experienced in the past, and thus it stimulates thinking about plausible scenarios.

Maintaining a 'business as usual' approach in a world marked by disruption means that leaders, institutions and states will be caught off guard and ill-prepared. It will reduce the efficiency and effectiveness of these actors and the trust that the public has in them to cope with crisis and adapt to change. To make sense of rapid changes in an unpredictable world, we need to think the unthinkable, expect the unexpected and imagine the unimaginable. Since this is a contradiction in terms, we can only improve our ability to anticipate.

This report uses strategic foresight to analyze how the future of organized crime in the Western Balkans might develop between now and 2035. It uses scenarios to help envisage

1 Peter Schwartz, *The Art of the Long View: Planning for the Future in an Uncertain World*, Wiley, 1997.

plausible future shifts and developments, and thereby guide policymakers and other stakeholders in reducing the risks and harms of organized crime in the region.

THREE FUTURE HORIZONS: NEAR, NEXT AND FAR

The future is an elastic concept. Therefore, it is useful to be more precise about how far into the future one intends to look. Generally, strategic foresight thinking divides the future into three phases, or horizons: the immediate future, the next future and the distant future.

- The near or immediate future is the foreseeable future, about three to five years ahead. It is generally shaped by past decisions and events, and can only be changed by disruptive events or sudden changes (referred to as 'wild cards' or 'black elephants'). The immediate future is characterized by a relatively low level of uncertainty.
- Next futures are about the medium term, roughly a decade or two from now. What happens in that time span depends to a great extent on the interplay between megatrends, key drivers of change, key actors and resource allocation. Due to their interactions and feedback loops, next futures are unpredictable and inherently carry a higher level of uncertainty than the immediate future.
- Far futures refer to long-term trajectories (20 to 50 years). They depend on the outcome of next futures, the interplay of megatrends, and as yet unknown innovations and new actors. Far futures are therefore characterized by a high degree of uncertainty.

Strategic foresight also categorizes different types of drivers of change. These include megatrends, ordinary trends and weak signals.

- Megatrends (or global trends) often take decades to establish themselves and prove robust in the face of shocks or setbacks. They permeate all societies and spheres of life, and last for several decades, which distinguishes them from fleeting trends or fashions. Megatrends often develop their full impact and pervasiveness only when they interact, forming megatrend clusters.
- Drivers of change (or ordinary trends) are more limited change factors than megatrends. They are often time-bound and confined to specific regions, societies, economic sectors or social groups. Common drivers of change do not evolve into global or megatrends but are replaced by new drivers. They have a limited lifespan, rarely lasting a generation.

- Weak signals are emerging drivers of social change. From today's perspective, their impact and reach are not yet fully understood. Furthermore, not all weak signals develop into significant drivers of change. Their early identification improves our ability to anticipate and mitigate emerging risks, and identify and exploit emerging opportunities. However, distinguishing weak signals of relevant change from meaningless noise can be challenging.

This project on the future of organized crime in the Western Balkans looks beyond the immediate future in order to identify possible longer-term shifts and scenarios that policymakers should be thinking about and trying to influence today. A 10-year time horizon has been chosen. This can enable creative thinking about the potential impact of megatrends, such as technological change and geopolitics, beyond the limitations of the immediate future, but without delving into too many 'unknown unknowns' of a world a decade from now.

INTERSECTIONS

Scenarios are not predictions; they are rather plausible stories about how the future might unfold. Scenarios – and the trend analysis on which they are based – help us to see the future not as a linear continuation of past patterns, but as a series of often disruptive changes. The future will not look exactly like any of these scenarios. What is interesting are the underlying patterns and the intersection of emerging trends and drivers of change that may lead to a fundamental shift in the way organized crime operates in the future.

The intersection of future patterns or criminal markets can reveal critical nodes or leverage points where changes can have the greatest impact on systems. Therefore, the scenarios outlined in the following pages should not be regarded as mutually exclusive. Some trends and drivers of change affect different scenarios in similar ways. For example, megatrends such as rapid technological change, geopolitics and climate change could have an impact on the 'criminal states', 'fortress Europe' and 'scarcity markets' scenarios. Governance will determine the likelihood of the 'criminal states', 'rent-a-mob' and 'crime is elsewhere' scenarios.

Focusing on these not-so-distant plausible futures should motivate us to design progressive interventions, enhance risk reduction and create proactive societal strategies to reduce the potential harm of organized crime.

TRENDS IN ORGANIZED CRIME IN THE WESTERN BALKANS IN THE DECADE AHEAD

The Global Initiative Against Transnational Organized Crime (GI-TOC)'s Observatory of Illicit Economies in South Eastern Europe conducted strategic foresight workshops to analyze emerging trends in organized crime in the Western Balkans in the next decade. Using the PESTEL analytical framework,² the analysts first collected and validated emerging trends (including megatrends, drivers of change and weak signals) in various areas of social development that may have an impact on organized crime in the Western Balkans over the next decade. The key insights are set out below.

(GEO)POLITICAL TRENDS

- **Return of geopolitics:** The Western Balkans region is a key theatre for geopolitical rivalry.
- **Fortress EU:** The EU is closing borders to irregular migration.
- **Violent conflict:** The impact of the Ukraine war, including the demonstration effect of unilaterally changing borders by force, could have implications for the region.
- **Weak signals:** AI could evolve into autonomous entities influencing geopolitics and illicit economies. The security space could become increasingly privatized; non-state actors, including private military companies and criminal groups, could both provide and create the need for protection.

(GEO)ECONOMIC TRENDS

- **Moving money:** Criminals make growing use of cryptocurrencies while still hanging on to cash and using informal value transfer systems.
- **Demographic shifts:** Significant internal and external migration is affecting the region, with brain drain and urbanization posing challenges.
- **Foreign direct investment (FDI):** Increased FDI from China, Türkiye, the Gulf, the US, Russia and the EU, among others.
- **Tourism and construction:** Urbanization, infrastructure and tourism-related construction become key sources of organized crime and corruption activities (e.g. money laundering).
- **Weak signals:** Trade wars and embargoes could trigger sanctions affecting the Western Balkans. The region may become a key link in global supply chains, particularly due to lithium deposits and trade as a result of FDI and proximity to the EU.

SOCIAL TRENDS

- **Identity politics:** Migration, nationalism and geopolitical tensions are driving identity-based conflicts.

- **Rise of social media:** Influencers are being co-opted by organized crime; criminals become influencers (also with an impact on politics); deep fakes become a tool for extortion and misinformation.
- **Income inequality:** The gap between rich and poor is widening, creating opportunities for informal economic actors and a propensity for disadvantaged groups to engage in illicit activities.
- **Weak signals:** Civil awakening – a movement towards greater lawfulness could emerge as people demand more political participation and greater integrity.

TECHNOLOGICAL TRENDS

- **Low digital literacy:** This exacerbates vulnerability to cybercrime.
- **Synthetic drugs and 3D printing:** Present new avenues for organized crime.
- **Cybercrime:** Hackers are offering crime as a service.
- **Weak signals:** Increasing use of drones for illicit activities.

ECOLOGICAL TRENDS

- **Climate change:** Natural disasters and food and water insecurity are growing concerns. Climate change could create new scarcity markets.
- **Green energy:** The transition to green energy is creating attractive subsidies exploited by organized crime groups and corrupt officials.
- **Weak signals:** The production of synthetic drugs could contaminate the food chain. Technologies like cloud engineering might be used to manipulate the climate, exacerbating ecological risks.

LEGAL AND REGULATORY TRENDS

- **Crypto regulation:** There is a growing need for cooperation between countries to regulate encrypted communication and crypto transactions.
- **Anti-corruption:** Policies to address corporate criminal liability are being developed and more rigorously enforced.
- **Weak signals:** The growing impact of EU legislation on the region simultaneously enhances integrity and creates new opportunities for criminal actors.
- **Proliferation of special economic zones:** Special economic zones could expand, becoming hubs for illicit activities.
- **Tech innovations:** Criminal middlemen could exploit unregulated innovations for profit. There could be an arms race between law enforcement and criminals in which those who adapt more quickly win.

2 PESTEL stands for political, economic, social, technological, environmental and legal-regulatory factors of societal change. See What is a PESTEL analysis?, Oxford College of Marketing, <https://blog.oxfordcollegeofmarketing.com/2016/06/30/pestel-analysis/>.

PROBABILITY, PLAUSIBILITY AND UNCERTAINTY: CURRENCIES OF FUTURE THINKING

After collecting potential drivers of change, the group of analysts reflected on their potential impact on organized crime in the Western Balkans. The group also discussed the degree of certainty that a driver would occur or even become systemic within the next 10 years.

In strategic foresight and scenario development, the concept of uncertainty is central. The higher the level of uncertainty about the emergence of a trend, the more ambiguity there is in the system. And the greater the uncertainty, the more plausible will alternative future outcomes, or scenarios, be. On the other hand, if the emergence of a trend is highly certain, it must be reflected in future scenarios, such as the impact of climate change or the multipolarity of the international system.

This leads us to another distinction, namely between probable and plausible future developments. While probability is a quantitative concept (the degree of likelihood that an event will actually occur), plausibility is a qualitative concept (whether the underlying assumptions are correct). Whereas any scenario must be plausible (intrinsically logical, based on generally accepted wisdom), probability depends on the actions of actors who may have an interest in a scenario unfolding.

ACTOR AND STAKEHOLDER MAPPING

Trend analysis alone is not enough to develop future literacies. Ultimately, it is the actors with vital interests and allocated resources who drive future developments. Therefore, a thorough PESTEL analysis must always be accompanied by an in-depth actor and stakeholder analysis.

The leading question of any actor mapping, particularly when it comes to organized crime, is: Who benefits? And who loses? To distinguish more powerful actors from less influential ones, we apply a simple definition of a key actor: key actors are those who accumulate legitimacy, sufficient resources (including intangible resources such as political will) and reliable networks to tap into the constituencies and resources of partners and like-minded actors and stakeholders. These actors need not be carrying out licit activities. Indeed, this study focuses mostly on criminal actors and their enablers.

A sound understanding of the future actor and stakeholder landscape is a prerequisite for building alliances, developing monitoring systems, designing effective policies and strategies, hedging risks and building capacity in a timely manner.

PLAUSIBLE NARRATIVES OF THE NEXT FUTURE

Based on the PESTEL and actor analyses, the authors developed a series of plausible alternative stories of organized crime in the Western Balkans in 2035. Written as narratives from the not-too-distant future, these scenarios illustrate how organized crime is reinventing itself and transforming into a force capable of undermining societies, economies and political systems.

A backcasting exercise usually starts with a baseline scenario, looking at the systemic factors that allow organized crime to thrive today. This is reflected in the box above 'Trends in organized crime in the Western Balkans in the decade ahead'. By looking at megatrends, other drivers of change in the Western Balkans, and emerging actors and stakeholders, we have developed plausible trajectories of change that could take us into uncharted territory over the next decade.

EARLY WARNING SYSTEM: TRACKING EMERGING FUTURES

Scenario thinking entails a structured way of having an evidence-based conversation about evolving developments and policy responses to emerging risks and opportunities. To make the most of scenarios, organizations need to monitor change not only in real time, but also in an anticipatory way. This involves identifying early warning indicators and carrying out regular horizon scanning to monitor if these warning signs emerge. Furthermore, scenarios can help with the process of strategy development by telling potential stories of the future that can trigger forward planning rather than ex post facto explanations.

Our hope is that this report can stimulate strategic thinking among policymakers and law enforcement agencies in the Western Balkans and in countries seeking to reduce the harm posed by organized crime from the region. We also hope this can inspire other regions to take a similar approach, so that we can increase the chances of getting out in front of the fast-moving and shape-shifting phenomenon of organized crime.

NOTE TO READERS

The scenario narratives that follow are based on analysis of emerging facts and data from the 'future'. To explain how we came up with the scenarios, the reader is presented with current assumptions, drivers of change, key actors and scenario pathways. These hypothetical narratives, which seek to depict the future of organized crime in the region, are described in the present tense.

THE RECENT HISTORY OF ORGANIZED CRIME IN THE WESTERN BALKANS

Before looking to the future, let us review the past and present of organized crime in the Western Balkans. In the 1980s, organized crime in the Western Balkans was linked to state-embedded actors within the Communist Party who generated hard currency for the state, elites and themselves through, for example, smuggling of cigarettes and weapons, and enabling the flow of drugs (particularly heroin) along the Balkan route. Many criminals left the region, partly because illicit economies were largely state-controlled. As a result, a Serbo-Croatian underworld emerged in some Western European cities such as Amsterdam, Brussels, Frankfurt, Paris, Stockholm and Vienna.

During the war in the former Yugoslavia between 1991 and 1995, some regimes sought to circumvent sanctions, for example by smuggling fuel and weapons. Criminal actors returned to fight, plunder and make quick profits, for example in paramilitaries, creating a strong nexus between crime and conflict. Links were also forged between football hooligan, paramilitary and organized criminal groups.

Economic crises, the collapse of a pyramid scheme in Albania in 1997, war in Kosovo in 1999 and instability in North Macedonia strengthened links between instability and organized crime as well as between Albanian-speaking and Slavic-speaking criminal groups, particularly in border areas.

In the late 1990s, many men with combat experience went abroad, often acting as the muscle for criminal groups in other parts of Europe, and engaging in relatively low-level crime such as extortion and break and entry, as well as more serious crimes such as human, drugs and arms trafficking. Some developed specialized skills, such as the Pink Panthers, who carried out daring jewellery heists.

There were also opportunities at home at a time of dramatic changes. Some officials who had been involved in kleptocracy in former state services made a smooth transition into business and politics.

In the early 2000s, after a crackdown on organized crime in Serbia following the assassination of prime minister Zoran Djindjic in 2003 and shrinking criminal markets at home, some entrepreneurial criminal actors started to explore opportunities in Latin America, making connections in cocaine source countries such as Colombia.

By the early 2010s, some of these groups – particularly from Albania, Montenegro and Serbia – began positioning themselves as global players in cocaine trafficking between Latin America and Western Europe, developing close links with criminal groups in both regions.

From the early 2000s until the mid-2010s, Albania became an important European hub for the cultivation of illicit cannabis – a practice that was later transferred to other countries, such as the United Kingdom, contributing to the emergence of high-profile activity by Albanian gangs there.

In the late 2010s, criminal groups from the region became established as global players in the cocaine trade, driving down prices and increasing market share. They were adept at using technology (such as encrypted apps for communication and laundering money through cryptocurrency) as well as moving their criminal gains transnationally. They also became more visible and notorious, particularly because of a violent feud between two Montenegrin clans, reports of a ‘Balkan cartel’, and media attention about Albanian gangs.

In short, organized crime has been a defining feature of the Western Balkans for the past 30 years. Despite over two

decades of political, economic, democratic and criminal justice reforms, state-embedded actors remain the most influential criminal actors in the region. Meanwhile, criminals from the region have become global players in Latin America and Western Europe, with tentacles reaching around the world.

SNAPSHOT OF ILLICIT ECONOMIES IN THE REGION

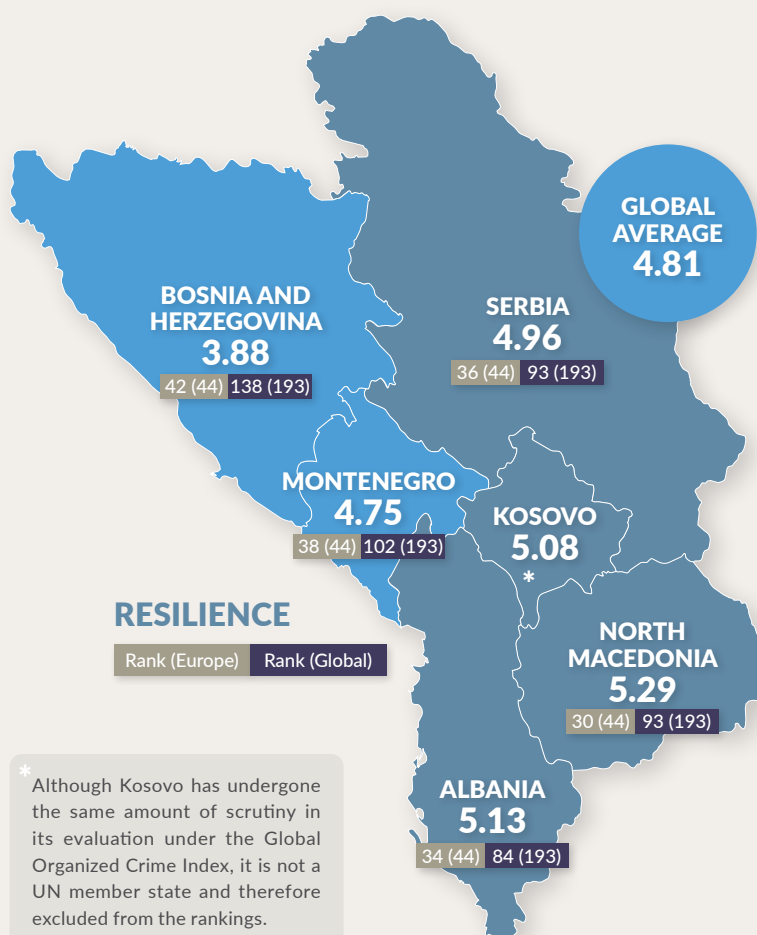
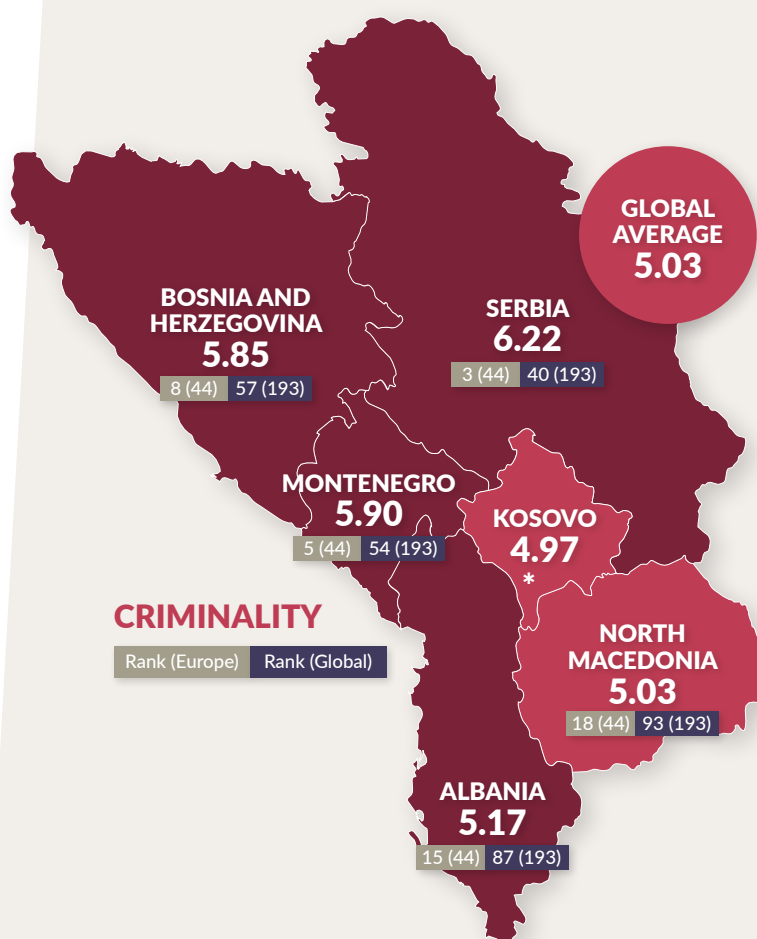
According to the Global Organized Crime Index (2023), the six countries of the Western Balkans rank high in criminality levels and low in resilience indicators relative to other European countries.

The core illicit markets in the region are heroin trafficking, financial crime and human smuggling. Cybercrime is a growing market.

State-embedded actors are the most influential criminal entities in the Western Balkans, closely followed by criminal networks. This phenomenon is explained by the high levels of corruption endemic in many countries of the region.


Criminal groups from the region are active abroad, particularly in smuggling of cocaine from Latin America to Western Europe.

Resilience to organized crime in the region is slightly higher than the global average, but lower than most European countries.



CRIMINAL STATES





Despite the pull of EU accession, some Western Balkan countries continue to be 'stabilitocracies', i.e., countries with stable but not democratic governments. State-embedded and foreign criminal actors team up with shady entrepreneurs to deepen their influence in government, cementing control over critical sectors such as construction, energy and finance. Political power becomes increasingly centralized, with corruption and patronage networks insulating criminal actors from accountability. Other countries become less critical after this governance model becomes more mainstream in several European countries and the US after 2025. The use of sanctions also declines as external powers seek transactional relations with strongmen leaders in the region.

In 2028, two foreign nationals are arrested for attempting to blow up a prosecutor's office in a Balkan country. Evidence links the assassination attempt to a foreign-based organized crime group comprising mostly Western Balkan members. The so-called Donbas gang had been under surveillance for smuggling weapons from Ukraine to Western Europe. A few months later, members of a foreign-based group made up of Balkan nationals are arrested at a Balkan port with a major shipment of weapons and explosives. There is evidence to suggest they were planning a terrorist attack. There are concerns that organized crime is 'coming home'.

In the late 2020s, violence erupts in a multi-ethnic Western Balkan country after an autocratic nationalist leader, allegedly active in illicit economies, mobilizes his supporters to attack members of a national minority community. It is thought that the real motive is to distract attention from economic hardship and to legitimize consolidating his power through emergency measures. The incident triggers an escalation in inter-ethnic violence and risks spilling over into a neighbouring country.

An illiberal leader of a Western Balkan country heavily affected by migration threatens to open the doors of a large refugee centre built by EU funds in the late 2020s. A delegation from the European Commission visits the country. Although not disclosed publicly, it is thought that a deal is reached. Soon after, EU funding to that country increases significantly.

Public discontent over corruption rises in some countries of the region, especially after a series of accidents stemming from substandard construction. This triggers massive protests and civil unrest.

By the early 2030s, leaders in some countries of the region adopt a hybrid criminalized state, whereby the government allows certain criminal elements (represented in parliament) to operate in exchange for loyalty or revenue, creating a semi-legalized structure for illicit activities. The government adopts controlled transparency measures to appease international criticism without disrupting profitable criminal operations.

By the early 2030s, at least one country in the region has become a notorious mafia state. While there is little internal political opposition or space for civil society, there is nevertheless instability as different criminalized state factions jockey for power and control over resources. This leads to a series of violent incidents, including assassinations and terrorist acts. The situation escalates to the point where the army imposes martial law, a move supported by a foreign power.



CONVENTIONAL WISDOM

- The Global Organized Crime Index 2023 ranks state-embedded actors highest in terms of criminal influence in the Western Balkans
- Organized corruption and political connections enable state-embedded actors to influence illicit and licit economies, involving regional political figures and law enforcement
- Criminal groups from the Western Balkans manage drug trafficking routes from Asia and South America through the Balkans to Western Europe, generating large revenue, enabling them to buy impunity
- Divergent geopolitical interests collide with regional dynamics and political agendas, enabling internal and external actors to instrumentalize the situation



TRENDS AND DRIVERS OF CHANGE

MEGATRENDS

- The EU retains its pull, but the slow and uneven pace of accession creates disillusionment
- Ongoing economic instability with inequality and unemployment
- Geopolitical interests of big powers drive internal state dynamics
- External actors use cybercrime to destabilize state structures

REGIONAL AND SECTORAL TRENDS

- Poor governance and rule of law
- Concentration of political power that is heavily reliant on FDI and state-owned enterprises
- Political control over media shapes public narratives
- Weak financial oversight, money laundering and organized corruption
- Weak criminal justice vulnerable to political interference
- Deep societal divisions and brain drain
- National security structures susceptible to political influence or cronyism

WEAK SIGNALS OF CHANGE

- Civic awakening, with mass protests against corruption and gun violence



KEY ACTORS

- Political elites and state officials, both local and international
- State-embedded criminal actors
- Foreign criminal actors
- Business leaders and private sector enablers, local and international
- Financial institutions and offshore entities
- Media and information control agents

MOST AFFECTED

- Public institutions
- Criminal justice institutions
- Ordinary citizens
- Small and independent businesses
- Youth and young adults
- Journalists and civil society activists
- Private sector
- Future generations



SCENARIO PATHWAY TO 2035

2025–2030

- Two foreign nationals are arrested for attempting to blow up a prosecutor's office. Evidence links the assassins to a foreign-based Western Balkan organized crime group
- Entrenchment of the criminal state, with criminal actors deepening their influence within government structures, cementing control over key sectors
- Political power becomes more centralized, with corruption and patronage networks insulating criminal actors from accountability
- Growing discontent leads to unrest
- Connected business, political and criminal elites gain legitimacy through nationalist narratives, sparking inter-ethnic conflict in one country, which risks spilling over to the wider region
- The EU sends a high-level delegation to a Balkan mafia state to plead with its leader not to open the gates of a large refugee centre


2030–2035

- Internal conflicts between criminal groups or factions in government lead to instability
- Criminal actors undermine one another to secure power and resources, leading to escalated violence, political assassinations and economic disruption
- Transformation to hybrid states where government partially reforms, allowing criminal elements to operate in exchange for loyalty or money. Government adopts controlled transparency measures to appease international pressures without disrupting profitable criminal operations
- A foreign-based organized crime group made up of Western Balkan nationals is arrested in the region with a major shipment of weapons and explosives intended for a terrorist act





FORTRESS EUROPE



By the late 2020s, more than 40 per cent of the Western Balkan population lives abroad. The trend is most pronounced among young people. Both the economy and public services face major shortfalls due to a lack of skilled workers, prompting the region's governments to attract foreign workers to fill the gaps. By the early 2030s, however, there are signs that this trend has slowed due to improved socio-economic conditions in the Balkan countries, EU accession for some countries in the region and the return of emigrants.

The Western Balkans undergo major demographic changes. Asian migration to the region increases, and the region remains a key corridor for Middle Eastern and North African migrants on their way to Western Europe.

However, migration becomes more difficult due to a 'fortress Europe' mentality in the EU. This fuels a booming market in counterfeit documents and migrant smuggling. The region also becomes a hub where lost or stolen genuine documents are traded by criminals. Counterfeiters make sizeable profits by facilitating documents for migrants, particularly from North Africa and the Middle East, who meet the demand for low-cost labour in the health, tourism, energy, construction and agricultural sectors. This is increasingly done online. Instead of facilitating their transit to the EU, smugglers make high profits by luring migrants into jobs in the informal economy in the Western Balkans. This leads to an increase in labour exploitation and trade in the grey economy. There is also a growing market for forged passports for Balkan countries that join the EU in the early 2030s.

Rapid urbanization and the increase of new minorities in the Western Balkans lead to a rise in the proportion of crimes committed by these immigrants, social tensions and xenophobia. Some groups that start out delivering food and other goods diversify into supplying drugs in urban areas and smuggling other migrants across the region.

Migration from rural areas leaves some communities almost uninhabited. Criminal groups seize this opportunity to buy land at a low cost and convert it for producing renewable energy, particularly solar and wind power, and fake organic food. Some remote regions also become attractive locations for the production of synthetic drugs.



CONVENTIONAL WISDOM

- The Western Balkans experience a mass exodus; out of a combined regional population of 18 million, 35 per cent live abroad
- Large diasporas from the region, particularly from Albania and Bosnia and Herzegovina, live in Western Europe
- Integration into the EU is seen as the best way to reduce illegal migration from the Western Balkans and encourage the return of migrants
- The Balkans is a key route for migrants and refugees en route to Western Europe



TRENDS AND DRIVERS OF CHANGE

MEGATRENDS

- Lack of good living standards (including wages, healthcare, education, security) in the Balkans
- Low political participation and pluralism in the region
- Migration from rural to urban areas fuels urbanization
- Violent conflicts and climate change drive large movements of people across the region
- A growing 'fortress Europe' mentality restricts migrants' access to the EU

REGIONAL AND SECTORAL TRENDS

- The public becomes disillusioned with political parties amid corruption scandals
- Lack of opportunities for the region's youth pushes them to emigrate

WEAK SIGNALS OF CHANGE

- Rising inequality and growing numbers of disaffected youth
- The Western Balkans become a destination for migrants, not just a region of origin and transit



KEY ACTORS

- Political parties in the region and abroad that fail to satisfactorily address the migration challenge
- European Union representatives
- Criminals engaged in human trafficking and smuggling
- Media and social media companies
- Balkan diaspora groups in Western Europe

MOST AFFECTED

- Balkan youth
- Civil society in the region
- Balkan health care systems
- Migrants in the Western Balkans
- Populations in regions bordering the Balkans
- Law enforcement and border control agencies



SCENARIO PATHWAY TO 2035

2025–2030

- More than 40 per cent of the Balkan population lives abroad, mostly young people
- The economy and public services suffer from a shortage of skilled workers, and governments seek to attract foreign workers
- Criminal groups made up of new migrants develop niche markets in certain hotspots and urban neighbourhoods
- Police discover a growing number of cases of new migrants as victims of human trafficking and involved in the production of synthetic drugs

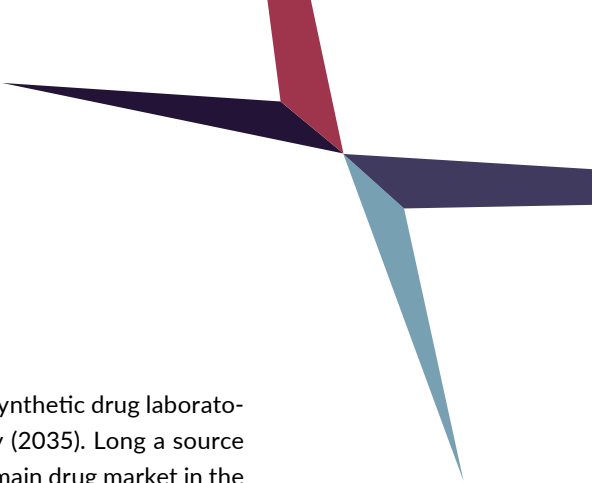
2030–2035

- By 2034, more than half of the population of the Western Balkans has emigrated
- Organized crime groups use cheap foreign labour to grow fake organic food and cannabis in large swathes of the countryside abandoned by emigration
- The percentage of new migrants to the Balkans grows considerably
- 'Fortress Europe' policies limit Balkan migration to the EU, reducing the remittances that diaspora communities can send back home, damaging local economies



BREAKING BAD





The Western Balkans region hosts the largest number of synthetic drug laboratories in Europe, according to the European Drugs Agency (2035). Long a source region for cannabis and a transit corridor for heroin, the main drug market in the region shifts to synthetic drugs – a result of changes in demand, increased availability of precursors and improved infrastructure, not least from Chinese investment.

Until the early 2020s, heroin used to be a commonly used drug across Europe, with Balkan organized crime networks dominating the market. However, by the late 2020s changes in drug supply patterns and user demand lead organized crime groups from the Western Balkans to shift their attention to the production and trafficking of synthetic drugs.

Organized crime groups seize the opportunity of increasing availability of precursors from China (which enter through Chinese-controlled ports and special economic zones in the region) to develop a new source of income from synthetic drugs. Meanwhile, access to drones enable traffickers to ship these cheaply produced drugs across the Adriatic and south-eastern Europe.

In August 2028, the Italian coastguard intercepts for the first time a drone carrying synthetic opioids. Later, two notorious Mexican meth 'cooks' are arrested in a remote village nearby. The Albanian prime minister denounces the detection of toxic waste on the shores of Vlora. Laboratory analysis conducted by forensic experts identify the waste to have emanated from the production of amphetamines. From 2028 to 2030, authorities note a steep increase in seizures of drones and drug production labs across the Western Balkans, in several cases using forced labour supplied by South Asian immigrants. In some drug production sites, such as in Albania and Croatia, the amount of toxic waste dumping has a severe impact on tourism, with media reports of tourists developing allergic reactions after swimming in polluted waters.

Initially, the authorities view the increasing production of synthetic drugs as an environmental and law enforcement challenge, but in the early 2030s it is recognized as a public health challenge. Treatment and overdose cases rise steeply owing to an increased prevalence of synthetic opioids and other stimulants. According to data from the European Drugs Agency, Serbia has now the second highest overdose rate in Europe, only surpassed by the UK. The EU launches a Mediterranean aerial defence shield in 2030 to deter Balkan groups from penetrating European retail markets, which leads these groups to shift their focus to domestic markets and to export synthetic drugs to China. The situation becomes so acute that Chinese authorities send Chinese police officers to monitor Chinese-run ports in the region to crack down on the export of Western Balkan-produced synthetic drugs to Asia.



CONVENTIONAL WISDOM

- Organized crime networks from the region play a leading role in the European drugs economy
- Networks are connected globally and have access to source regions for drugs, especially organic drugs
- Regional networks play a leading role in heroin, cocaine and cannabis markets, and will continue to do so
- There is a growing market for synthetic drugs in the region, including from increased tourism
- There is growing demand for new psychoactive substances



TRENDS AND DRIVERS OF CHANGE

MEGATRENDS

- Synthetic drug markets gradually replace markets for organic drugs
- Access to precursors in the region becomes easier due to massive trade with China and India, and an increased presence of Chinese FDI

REGIONAL AND SECTORAL TRENDS

- Heroin supply is interrupted due to the Afghan opium ban
- Increased legalization of cannabis means illicit supply is replaced with licit
- Synthetic opioids replace heroin
- Synthetic stimulants compete with cocaine and are easier to produce and obtain

WEAK SIGNALS OF CHANGE

- Increased Chinese presence in the Western Balkans
- Opium ban in Afghanistan
- Turf wars in the heroin market along the Balkan route (particularly involving Turkish organized crime groups)
- Boom in synthetics in Europe and Ukraine
- Increased seizures of labs producing synthetic drugs in the region
- Major seizures of drug precursors in the region (Skopje airport being one example in 2022)



KEY ACTORS

- Western Balkan organized crime networks
- Licit Chinese suppliers of precursors
- Crypto platforms benefiting from payment schemes associated with illicit financial flows
- Mexican and Dutch service providers that train Balkan networks in production of synthetics
- Irregular immigrants from South Asia work as cheap (or forced) labourers in sweat shops producing drugs
- Shipping and haulage companies, ports, airports

MOST AFFECTED

- Local youth and communities affected by easy access to drugs
- European countries fighting a new front against illicit drug supply
- Governments affected by increased levels of corruption and intimidation by empowered criminal networks
- Law enforcement dealing with near-shoring and new and unfamiliar substances
- Existing suppliers
- Heroin traffickers



SCENARIO PATHWAY TO 2035

2025–2030

- Chinese FDI surpasses European FDI in the region
- Chinese port companies take over the majority of regional ports
- Increased number of special economic zones in the region
- The Italian coast guard intercepts for the first time a drone carrying synthetics
- Social media channels offer cheap synthetic opioids and stimulants in Italy, Slovenia, Hungary and Romania
- Balkan authorities find increasing levels of toxic waste associated with synthetic drug production
- Treatment numbers for synthetic-related disorders soar; overdose rates from fentanyl and nitazenes spike
- Arrest of two notorious Mexican meth cooks in a Western Balkan country

2030–2035

- Italian and Greek coast guards and border authorities regularly intercept drones and vessels carrying precursors and synthetic drugs
- Leaders express their concern about an 'ecological crisis', with high levels of toxic waste hampering tourism
- The Western Balkans experience an opioid crisis, with numerous cases of overdose and treatment
- EU countries move to establish a Mediterranean aerial defence system
- Chinese authorities send police forces to Chinese ports in the region due to the increased presence of regionally produced synthetic drugs entering China





'TECHTONIC' SHIFTS



In the late 2020s, the Western Balkans emerge as a hub for cybercrime in Europe and for cybercrime-as-a-service globally. Balkan organized crime groups, traditionally involved in drug trafficking and smuggling, begin collaborating with foreign actors to expand their operations into the digital realm. Using advanced technological skills learned from laundering money abroad and capitalizing on AI-displaced tech experts, these groups engage in widespread disinformation campaigns in Europe and beyond, destabilizing political processes and undermining public trust in institutions. Leveraging the decentralized and encrypted nature of blockchain, criminal networks expand their operations in money laundering, fraud and illicit trade in digital assets, facilitating evasion from law enforcement agencies.

In 2027, the European Commission uncovers a critical security breach affecting IT systems in all EU countries. The breach is traced to software donated by China to the Western Balkans before their accession to the EU. Intended to modernize the region's digital infrastructure, the software contains hidden backdoors that allow foreign actors and organized crime groups to access sensitive data and disrupt critical infrastructure systems. This discovery strains relations between the EU, the Western Balkans and China.

The situation escalates in 2028 when elections in a Balkan country are discredited due to widespread electronic voting fraud. Investigations coordinated by Europol and Eurojust reveal that organized crime groups, in collusion with a foreign power, manipulated the voting systems, undermining the democratic process and sparking mass protests.

In the early 2020s, Balkan organized crime groups become notorious for their expertise in deepfakes and AI-generated fraud schemes. They create hyper-realistic fake media to blackmail public figures, manipulate stock markets and influence public opinion. The use of bots and automated systems enables them to carry out large-scale fraud and extortion schemes, exponentially increasing the number of victims and the scale of their operations.

In 2033, cybercriminal activity reaches new heights with a crippling ransomware attack on the health care systems of several European countries. Hospitals are forced to cancel operations and divert emergency cases, leading to a public health crisis. The attack is attributed to a coalition of Balkan organized crime groups and rogue state actors, highlighting the growing threat of geocriminality.

In 2034, recognizing that traditional responses are insufficient against this new wave of cyber threats, the EU takes unprecedented action. Project Aegis, an initiative that brings together government agencies, private tech companies and international partners, is launched in a joint effort to combat cybercrime. More than just a defensive measure, Project Aegis is an offensive strategy that uses AI and machine learning to predict and neutralize cyber threats in real time. By using quantum computing to decrypt criminal communications and deploying autonomous cybersecurity bots to patrol the digital landscape, it successfully identifies and isolates malicious activity before it can cause damage – a feat previously thought impossible.

For the first time in the context of a cyber crisis, the EU invokes Article 222 of the Treaty on the Functioning of the European Union – the 'solidarity' clause, which forces increased cooperation between member states, pooling considerable resources and intelligence to address the emergency. Cybersecurity experts, law enforcement agencies and ethical hackers work together to dismantle operations traced back to Balkan criminal groups operating in several parts of the world.



CONVENTIONAL WISDOM

- Relatively low digital literacy in the Western Balkans
- Brain drain of youth and an aging population
- Increased digital penetration in societies
- Increased incidents of cybercrime in and from the region
- Highly sophisticated misinformation campaigns and hacking attacks against and from the region
- Increased use of cryptocurrencies, particularly by Balkan organized crime groups outside the region
- Increased use of surveillance within large cities
- Widespread use of encrypted apps and communication methods by Balkan organized crime groups
- Hacking as a service is more accessible



TRENDS AND DRIVERS OF CHANGE

MEGATRENDS

- Rise in e-commerce, including for illicit goods and services (dark net)
- Increase in the use of unmanned aerial vehicles for drug trafficking and surveillance
- Use of social media for trafficking and recruitment into criminal groups
- Slow regulation of the digital space
- Data becomes a lucrative commodity for organized crime groups

REGIONAL AND SECTORAL TRENDS

- The Balkan countries transition to digital government, bringing associated vulnerabilities
- Large influx of digitally literate youth and IT experts from Russia and Ukraine as the result of the Russia-Ukraine war
- Increased use of crypto for money laundering and corruption

WEAK SIGNALS OF CHANGE

- Major ransomware attacks against the public administration
- Cyberscam centres dismantled in the region
- Incidents of diversion of state resources (energy supply) for illegal cryptomining
- DDoS attacks on government databases and services by foreign actors



KEY ACTORS

- Private sector (particularly tech companies)
- Foreign governments providing know-how and hardware/software
- Tech-savvy youth
- Law enforcement

MOST AFFECTED

- Aging population
- Critical infrastructure
- Government e-portals
- Sensitive personal data of all citizens



SCENARIO PATHWAY TO 2035

2025–2030

- The Western Balkans becomes a hub for cybercrime
- Balkan organized crime groups collaborate with foreign actors to spread disinformation in the region and beyond
- Balkan organized crime groups become notorious for their skills in deepfakes and AI-generated fraud schemes
- The European Commission discovers a critical security breach of IT systems affecting all EU countries and traces it to software donated by China to the Western Balkans before their accession to the EU
- Elections in a Balkan country are discredited because of widespread fraud in electronic voting


2030–2035

- Balkan organized crime groups become notorious for their expertise in deepfakes and AI-generated fraud schemes
- There is a crippling ransomware attack on the health care systems of several European countries
- The EU launches Project Aegis to combat cybercrime


```
void Main()
{
    i = 0; i < Convert.ToInt32(Settings.Delay); i++
    Thread.Sleep(1000);
    Settings.InitializeSettings(); Environment.Exit(0);
    if (!MutexControl.CreateMutex()) //if current payload is a duplicate
        Environment.Exit(0);
    if (Convert.ToBoolean(Settings.Anti)) //run anti-virtual environment
        Anti_Analysis.RunAntiAnalysis();
    if (Convert.ToBoolean(Settings.Install)) //drop payload [persistence]
        NormalStartup.Install();
    if (Convert.ToBoolean(Settings.BDOS) && Methods.IsAdmin()) //active
        ProcessCrashSec();
    if (Convert.ToBoolean(Settings.CreateMutex)) //if current payload is a duplicate
        Environment.Exit(0);
    if (Convert.ToBoolean(Settings.Anti)) //run anti-virtual environment
        Anti_Analysis.RunAntiAnalysis();
}
catch { }
while (true) // ~ loop to check socket status
{
    try
    {
        if (!ClientSocket.IsConnected)
        {
            ClientSocket.Reconnect();
            ClientSocket.InitializeClient();
        }
    }
    catch { }
    Thread.Sleep(5000);
}
```


A photograph of a protest scene. In the foreground, a dark-colored car is on fire, with bright orange flames and thick black smoke rising from it. Behind the car is a wall made of large, light-colored concrete blocks. In the background, there is a large, open industrial or construction site with a complex network of steel beams and scaffolding. A tall, thin tree stands in the center of the background. The sky is overcast. The overall atmosphere is one of chaos and destruction.

RENT-A-MOB



Organized criminal groups diversify their services and cash in on their reputation for violence. In the late 2020s, there are a number of incidents where criminal groups are hired (allegedly by political parties) to disperse crowds, for example during anti-government rallies or environmental protests opposing water shortages and lithium mining. In the late 2020s, independent journalists report an increase in the incidence of football hooligans with links to paramilitary and criminal groups provoking violence and threatening peaceful demonstrators.

Investigations reveal that some groups run private security companies during the day and carry out criminal activities on the side. The lines between the licit and the illicit become blurred. Some security companies win lucrative contracts to protect critical infrastructure, such as ports and energy terminals. They also provide financial support for political parties. During the blackouts of the early 2030s, these groups are hired by local governments, state-owned enterprises and foreign companies to provide security. In some communities, they acquire a degree of legitimacy as service providers and protectors.

Some of the most feared criminal groups from the Western Balkans include members with combat experience in Ukraine. From the mid-2020s, these groups develop a niche in weapons trafficking from Ukraine as well as assassinations, and maintain links with both Ukrainian and Russian-based criminal groups. There are indications that some members of these groups are operating abroad. For example, in 2028 police and military in Colombia arrest several dozen members of an armed group guarding a cocaine growing region; 14 members are nationals from the Western Balkans.

A rise in populism, increased foreign interference due to geopolitical competition, plus sophisticated misinformation campaigns (including deep fakes and data theft) fuel inter-ethnic tensions in parts of the region. Paramilitaries and criminal groups team up to carry out attacks against rival communities. An investigation in 2028 reveals that some of these groups have received funding from foreign governments and include former members of security services.

These groups are not just thugs – some attract members with sophisticated skills. The rapid transition to cryptocurrencies by some criminal groups from the Western Balkans in the 2020s (to avoid detection of money laundering) as well as quick adaptation in the use of technology for blackmail and extortion make some Balkan experts with links to the underworld sought after as providers of crime-as-a-service. In some cases, former intelligence officers from the region are hired by foreign governments to draw on their skills in the dark arts.

In one of the first operations of its kind, INTERPOL discovers in 2033 state-backed manipulation of a digital currency in a country of the region. It is thought that state-embedded actors colluded with cyber experts to carry out this crime. It is rumoured that INTERPOL discovered the crime using pioneering quantum computing technology, but refuses to comment publicly.



CONVENTIONAL WISDOM

- Strong presence of far-right groups in some countries of the region, including with links to political parties
- Football hooligans with strong links to politics and organized crime
- Private security companies win lucrative contracts
- Paramilitary groups with recent combat experience (in Ukraine and the Middle East)
- Violence as a market or service, where criminal groups and private security companies are hired to provide protection, extortion and intimidation
- Easy access to large supply of weapons, including legacy from Yugoslav wars as well as weapons produced in the region



TRENDS AND DRIVERS OF CHANGE

MEGATRENDS

- Expansion of far-right ideology and extremism
- Authoritarian leadership
- Identity politics (including violent extremism and extreme nationalism)
- Spillover of geopolitical conflicts (including Ukraine and the Middle East)

REGIONAL AND SECTORAL TRENDS

- Growing inter-ethnic tensions
- Umbrella of political protection
- Lack of opportunities for youth
- Poor institutional performance and oversight of security sector institutions
- Polarized political environment
- Increased need for private security (e.g. of critical infrastructure, gated communities, night clubs and casinos)

WEAK SIGNALS OF CHANGE

- New paramilitary groups
- Kumanovo incident (2015)
- Banjska incident (2023)
- Urbanization, inequality and disaffected youth



KEY ACTORS

- Extreme political parties
- Tycoons and questionable businesspeople
- Foreign actors (from Russia and the Gulf funding violent actors)
- Hooligan groups
- Intelligence services, police and army
- Corrupt public servants
- Controlled media
- Diaspora or actors involved in wars and organized crime abroad

MOST AFFECTED

- Opposition parties
- Ethnic minorities
- Youth
- Civil society
- Free media and investigative journalists
- Local movements
- Rival groups (criminal, ethnic, hooligan, political)



SCENARIO PATHWAY TO 2035

2025–2030

- Organized crime groups and hooligans are hired by Western Balkan governments to break up protests outside lithium mines
- A paramilitary group returns from war in Ukraine and forms a formidable group specializing in weapons trafficking
- Armed clashes close to outer borders of the region erupt between foreign migrant smugglers and local organized crime groups over the expanded smuggling market brought on by wars, climate change and the 'fortress Europe' mentality
- Organized crime groups engage in violent outbreaks related to inter-ethnic tensions
- An Albanian private security company wins a tender to guard the port of Durres, owned by the United Arab Emirates
- An investigation reveals a major investment by a foreign government in a paramilitary group in the region
- Hooligans from the Western Balkans are arrested in a major European city for causing violence during a rally of a left-wing candidate


2030–2035

- A private security company is deployed to protect new pipelines in the region
- A private security company from the Balkans gains international reputation as a ruthless provider of crime-as-a-service
- Police in Colombia arrest a paramilitary/organized crime group hybrid force, including several dozen members from the Western Balkans
- The mayor of a major city engages a paramilitary/organized crime group hybrid force to impose a state of emergency after a blackout
- INTERPOL discovers Western Balkan state-backed manipulation of a digital currency



SCARCITY MARKETS





In the 2030s, higher temperatures lead to deaths and droughts in parts of the Western Balkans. Increased demand for electricity (not least for air conditioning) results in widespread blackouts. High temperatures also make wildfires an almost annual occurrence. Extreme weather manifests itself in flash floods and unusually heavy snowfall in some mountain regions. These extreme weather conditions displace thousands of people within the Western Balkans, creating a regional climate migration crisis. Rural populations, unable to sustain agriculture due to these conditions, move to overcrowded urban areas or attempt to migrate to the EU.

Water becomes a valuable commodity – for irrigation, drinking and hydroelectric power – and its value attracts the attention of criminal groups. Police in the slums of one of the region's fastest growing cities are reluctant to confront a well-armed group that controls the local water supply. This so-called 'water mafia' sells water at exorbitant prices to desperate communities, further exacerbating social inequality and causing social unrest.

As part of the EU accession process, Western Balkan countries take part in the 'green transition'. However, the European Commission increases its vigilance following a corruption scandal in the late 2020s, in which a Balkan environment minister is implicated in a fraud scheme involving EU subsidies.

The EU also takes steps to crack down on fraud related to the issuance of certificates for the EU's Carbon Border Adjustment Mechanism (CBAM). Increased trade through the Western Balkans, particularly from China, makes the region a key entry point for goods into the EU market. Forging CBAM certificates is a lucrative business, reducing import prices and circumventing EU carbon pricing regulations.

Increased cooperation between Balkan law enforcement agencies and Europol's environmental crime unit leads to the arrest of sand mafias in several parts of the Adriatic coast (who serve the booming construction industry) and arsonists who set fire to forests as part of a scheme to change zoning laws for property development. There is a lucrative black market for certain kinds of increasingly rare seafood. Furthermore, there are reports of an increase in artisanal mining in the region, including for copper, chromite, gold and zinc. Some of these mining sites are controlled by criminal groups. A growing market for boron and lithium fuels interest in exploiting deposits of these precious minerals in the Western Balkans. The industry becomes a magnet for shady deals between politicians and 'questionable' businesspeople.

Pollution from mining operations increases public health risks and demand for clean water, playing into the hands of water mafias. In collusion with corrupt public officials, criminal groups control access to clean water, smuggling it across borders or selling it at exorbitant prices. In some cases, they manipulate public systems to divert resources to private buyers. The result is a lucrative black market in water, where the stakes are life or death.



CONVENTIONAL WISDOM

- Climate change is a reality and getting worse
- Summer temperatures in the Balkans rise 7.5 degrees above pre-industrial levels
- Global greenhouse gas emissions continue rising
- The Western Balkans experience extreme heat, drought, flooding and wildfires
- The climate emergency leads to water shortages
- The region embarks on a green transition as part of EU accession and the UN's Sustainable Development Goals



TRENDS AND DRIVERS OF CHANGE

MEGATRENDS

- Extreme weather events become more severe and frequent
- More large-scale investments in green energy projects, such as solar, wind and hydroelectric power

REGIONAL AND SECTORAL TRENDS

- Competing trends between development of infrastructure and tourism, and sustainable development
- Discovery of valuable critical minerals in the region, such as lithium
- Increase in urbanization
- Widespread and frequent blackouts

WEAK SIGNALS OF CHANGE

- Hazardous waste from synthetic drug production in the region affects public health and tourism
- Higher temperatures cause water shortages



KEY ACTORS

- Government, ministries and public bodies that deliver on their national adaptation plans
- Regional and international bodies, including the EU, responsible for green transition projects and milestones
- Private sector actors engaged in developing the green economy in the region and receiving subsidies
- Mining sector
- General population affected by climate change and water scarcity

MOST AFFECTED

- People in the agricultural sector
- Tourism sector
- Society as a whole
- Fast-growing cities
- Natural habitats



SCENARIO PATHWAY TO 2035

2025–2030

- Countries in the Western Balkans adapt legislation to the CBAM as part of EU accession
- The Western Balkans become a key hub for circumventing the CBAM
- An environment minister is arrested in a Balkan country for a fraud scheme associated with green transition subsidies
- Arsonists contracted by a criminal syndicate are arrested for starting wildfires to clear land for property development
- Water becomes an attractive commodity for organized crime groups
- Sand mafias emerge due to a construction boom in rapidly growing cities

2030–2035

- A hybrid paramilitary/organized crime group overtakes the main water source of a city and starts controlling water distribution
- Rise in unregulated artisanal mining controlled by armed groups
- A Balkan country's government is caught procuring illegal chemicals needed for geoengineering on the black market
- Major coca plantations are discovered in the highlands of Albania and Montenegro



HAZARDOUS


-rrezikshmëri e lartë

PRISHTINA

BREATHING

KILLS

CRIME IS ELSEWHERE



The EU accession process strengthens criminal justice systems in the Western Balkans. In addition, concerns about instability in the region as a result of tensions between the EU and Russia and China accelerate the provision of UK and EU technical assistance, and lead to increased cooperation between EU countries and institutions, including Europol, Eurojust and Frontex.

An agreement between Serbia and Kosovo paves the way for normalization of relations and allows Kosovo to join the Organization for Security and Co-operation in Europe (OSCE) and INTERPOL, increasing intelligence sharing and mutual cooperation.

Criminal groups from the Western Balkans shift most of their activities abroad, particularly to Latin America, Western Europe and criminal superhubs such as Marbella and Dubai. Other countries are now considered less risky than the Western Balkans for carrying out illegal activities. Europol no longer uses the term 'Balkan cartel', but simply refers to criminal groups of Balkan origin operating abroad. However, networks remain strong, including in cyberspace.

The inclusion of all Western Balkan countries in the Schengen area and the deployment of Frontex on the EU's external borders diverts human trafficking away from the Balkan route. Ukraine replaces the Western Balkans as the main source of arms trafficking, particularly since the reopening of Black Sea ports and the increased use of the Danube for trafficking operations.

Less heroin flows through the region since the reduction of opium cultivation in Afghanistan and less demand. Many Balkan organized crime groups formerly involved in the trade switch to trafficking synthetic drugs, some of which are produced in the Western Balkans. Less heroin and more synthetic drugs increase competition and cooperation between criminal groups in the Balkans and the Black Sea region. Analyses by international organizations and civil society indicate that the Black Sea route is now used more than the Balkan route for trafficking.

The 2029 Global Organized Crime Index shows that half of the Balkan countries are below the European average in terms of criminality and criminal actors, while resilience scores rise to around the EU average.

Closer integration of the Balkan countries into the EU and increased digitalization make the region more vulnerable, for example to data theft and illicit financial flows. In 2028, Europol opens a digital forensics office in a Balkan capital. Countries in the region strengthen law enforcement cooperation with counterparts in Latin America, Türkiye and Western Europe, while China becomes an observer to the Southeast European Law Enforcement Center (SELEC).

A strengthened democracy and rule of law lead to a flourishing civil society and greater socio-economic prosperity. More young people remain in the region and those who emigrated in the early 21st century, especially to the United States and Western Europe, return. A young, educated and well-trained workforce, as well as the region's geostrategic location, make the Western Balkans an attractive destination for tourists and foreign investors, further raising the living standards in the region.



CONVENTIONAL WISDOM

- Western Balkan countries move towards EU accession at varying speeds
- Balkan organized crime groups are increasingly active outside the region, e.g. in Latin America and Western Europe
- The US remains engaged in the region and pushes for stability and democracy
- Countries at the forefront of EU accession take a harder line against organized crime and corruption
- Geopolitical tensions increase the interest of the EU and NATO in a stable and Western-oriented Balkan region



TRENDS AND DRIVERS OF CHANGE

MEGATRENDS

- Global polarization between liberal democracies and autocracies
- Social media as a tool for promoting democracy, societal control and extremism
- Blurring of lines between licit and illicit economies, particularly as a result of money laundering
- Increasing efforts by EU and Western democracies to enhance cooperation against serious organized crime and illicit financial flows
- Internationally active organized crime groups congregate in crime hubs such as Marbella, Western European ports and Dubai

REGIONAL AND SECTORAL TRENDS

- Political polarization
- Low voter turnout and disillusionment with mainstream parties
- Organized corruption in some states stifles rule of law and democracy

WEAK SIGNALS OF CHANGE

- Social movements against gun crime and corruption
- Vibrant civil society actors at the local level, including in hotspots of organized crime
- Youth as agents of change



KEY ACTORS

- Balkan organized crime groups operating abroad
- Criminal justice systems in the Western Balkans
- Special anti-organized crime prosecutors
- External actors, such as the US, the EU and the UK, that provide technical assistance and political support
- Civil society actors
- Youth groups

MOST AFFECTED

- Public at large
- Private sector
- Youth
- Democratic political parties



SCENARIO PATHWAY TO 2035

2025–2030

- The 2029 Global Organized Crime Index shows half of the Western Balkan countries below the European average for criminality and criminal actors
- Europol no longer uses the term 'Balkan cartel', but refers to criminal groups of Balkan origin operating abroad
- Google searches show that the Black Sea route is now used more than the Balkan route for trafficking
- The inclusion of all Western Balkan countries into the Schengen area and the deployment of Frontex at the EU's external borders diverts trafficking away from the region
- Europol opens a digital forensics office in a Balkan capital

2030–2035

- Two countries from the Western Balkans become EU member states
- Serbia and Kosovo sign an agreement of bilateral understanding, paving the way for Kosovo to join the OSCE and INTERPOL
- China becomes an observer in SELEC after a mutual understanding to combat crime in the Western Balkans and Balkan criminal groups in China



THE INTERSECTION BETWEEN FUTURE SCENARIOS IN THE WESTERN BALKANS

The strategic foresight scenarios should not be viewed in isolation. Rather, they reflect interconnected dynamics that may unfold simultaneously, each scenario amplifying the others and intensifying their combined effects in the Western Balkans. For example, the scenarios 'fortress Europe', 'criminal states' and 'rent-a-mob' contain elements and plausible futures that could develop in parallel, influence one another and mutually reinforce each other.

In 'fortress Europe', increased emigration and restrictive EU border policies drive demographic changes, leading to labour shortages and economic pressures. This creates a fertile ground for criminal enterprises that exploit migrants by providing counterfeit documents and facilitating smuggling. These illicit markets intersect seamlessly with the dynamics outlined in 'criminal states', where state actors and organized crime groups collaborate to control lucrative sectors such as energy, construction and finance. The economic void left by emigration exacerbates the vulnerabilities related to governance, thus enabling corrupt elites to solidify power even more by capitalizing on the lack of oversight as a result of a weakened civil society and lack of public accountability.

At the same time, the 'rent-a-mob' scenario highlights how organized criminal groups evolve, offering violence as a service to political and economic actors. As the political landscape becomes increasingly corrupted through arrangements described in 'criminal states', politicians and corporate interests rely heavily on violent criminal groups to suppress dissent and maintain control, particularly during periods of civil unrest triggered by economic hardships and xenophobic tensions from increased migration (particularly from North Africa and the Middle East) outlined in 'fortress Europe'.

The intersection of demographic change and criminalized governance accelerates urbanization, leading to these heightened social tensions and xenophobia. These conditions provide an ideal environment for the violent groups described in 'rent-a-mob' to recruit and operate under the guise of private security firms, protecting key infrastructure that criminalized states prioritize. As governments lose credibility due to corruption scandals and social tensions, criminal groups expand their legitimacy by positioning themselves as necessary stabilizing forces.

Furthermore, economic deterioration and growing migration pressures encourage the criminal exploitation of rural and abandoned areas, transforming them into illicit hubs for synthetic drug production and counterfeit goods, a trend forecasted in 'fortress Europe' and 'breaking bad'. These illicit economies strengthen organized crime groups, further empowering them economically, politically and socially. As these criminal enterprises gain influence, they deepen their ties with corrupt state actors described in 'criminal states', creating and solidifying the feedback loop of corruption, crime and political control.

Advanced technologies adopted by criminal groups over the years will result in enhanced capabilities for disinformation, financial fraud and cybercrime. The 'rent-a-mob' scenario emphasizes how these groups become sophisticated crime-as-a-service providers, leveraging cryptocurrencies and technological expertise to support the corrupt networks established in 'criminal states'. The resulting financial and technological empowerment strengthens their ability to circumvent law enforcement and evade accountability.

Ultimately, the scenarios do not represent distinct outcomes but rather interwoven narratives of potential futures. If conditions described in one scenario materialize, it will inevitably create dynamics that amplify elements of the others. Recognizing the interconnected nature of these scenarios is crucial for developing comprehensive and proactive strategies aimed at mitigating risks, enhancing regional stability and addressing organized crime effectively in the Western Balkans.

TRACKING AND TRACING

While foresight is about understanding plausible futures, strategic foresight involves actively using this information to inform policies. Therefore, how can organizations use these scenarios to enhance prevention, develop effective policy responses to emerging risks and opportunities, and avoid possible danger ahead?

One way is to monitor if weak signals become stronger. Reacting to such turning points enables policymakers to be on the pulse of change.

SCORING THRESHOLDS

Criminality

1	2	3	4	5	6	7	8	9	10
NON-EXISTENT TO LITTLE INFLUENCE			MODERATE INFLUENCE		SIGNIFICANT INFLUENCE		SEVERE INFLUENCE		

Another warning sign is when some of the events anticipated in the scenario paths come to pass. This usually indicates a key turning or tipping point. Information from local sources or sectoral experts can pick up signals of unusual activities, emerging societal changes or warning signs that may indicate larger future trends. AI and big data can also improve the ability to spot patterns and thus identify weak signals. The challenge, however, is to distinguish meaningful signals from irrelevant noise. Since the world evolves in unpredictable ways, users of

Another way is to track data points. For example, the Global Organized Crime Index includes thresholds for criminality scores. If a country's score for a criminal market or actor crosses a key threshold – e.g. from moderate to significant influence – this should raise a red flag. Therefore, it is helpful to monitor the severity of risk on a regular basis and how these risk factors influence other drivers of change in the system. Similarly, tracking resilience scoring is a key indicator of a country's ability to cope with illicit economies.

Resilience

1	2	3	4	5	6	7	8	9	10
NON-EXISTENT OR EXTREMELY INEFFECTIVE			MODERATELY EFFECTIVE		SUFFICIENTLY EFFECTIVE		HIGHLY EFFECTIVE		

this tool should be alert to spot emerging trends that may not be included in the seven scenarios presented here.

Using strategic foresight as a recurrent exercise can enable organizations to constantly challenge assumptions, monitor trends, improve their 'foresight literacy' and remain agile and adaptable. This can strengthen anticipatory governance and criminal justice, and improve the future prospects of the Western Balkans.

HOW TO USE THIS RESOURCE

We don't have a crystal ball. But in a world of uncertainty, strategic foresight helps to systematically analyze emerging trends, to better understand their interaction and to anticipate plausible futures. It can help policy planners to be ahead of disruptive developments, hence to mitigate emerging risks, to prepare for unforeseen events and to seize upcoming opportunities. Thinking ahead can help backtrack in terms of planning (i.e., by developing an indicator-based early warning system) and to spot red flags when certain scenario pathways emerge.

We encourage policy planners to use this tool to provoke discussions and strategic planning, for example when drafting national and regional anti-crime strategies in the Western Balkans. We also challenge you to think of your own variations on these scenarios, factoring in trends and drivers of change, criminal markets and key actors.

If you are interested in drawing on the methodology and expertise of the GI-TOC, for example to apply this approach to other regions, please reach out to secretariat@globalinitiative.net.





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ABOUT THE GLOBAL INITIATIVE

The Global Initiative Against Transnational Organized Crime is a global network with over 700 Network Experts around the world. The Global Initiative provides a platform to promote greater debate and innovative approaches as the building blocks to an inclusive global strategy against organized crime.

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