The Future of the EU Civil Security Market 2032

Four plausible scenarios for the Future of the EU Civil Security Market 2032

Enabled / Anticipating

landscape

threat

dynamic

\$

respond

5

Capacity

A fragmented EU civil security landscape

In this world, external and internal pressures exacerbated existing tensions within the EU. An unwillingness for joint procedures coupled with extensive civil security threats, leads member states to pursue individual agendas. The EU and its institutions lose influence.

Resultingly, civil security policy and R&I is highly fragmented. There is healthy competition, but also too many solutions to tackle security challenges, none of which are aligned with common needs across EU member states.

The national approach to security increases responsiveness to threats. Yet it also leaves some member states behind and allows more cross-border crime. Reliance on third countries – as partners or suppliers - is therefore unavoidable. Fragmentation is also apparent in resilience of critical infrastructure, interoperability and use of resources.

The social cohesion required to align goals and priorities exists only at the national level.

Consolidated civil

A fragile EU

Highly

fragmented

priorities

In this world, the EU has had difficulties aligning on common civil security goals across member states. Under internal & external pressure interests further diverged over time.

The national level is the focus of civil security activity – policy, R&I, tech development – resulting in the duplication of capabilities and mandates. This approach also fosters intra-EU competition, encouraging innovation but weakening its outside competitiveness and attractiveness for security investment.

At the same time, the dependency on global security suppliers is drastically increasing. While this allows access to state-of-the-art solutions, the off-the-shelf nature leaves room to exploit for organized crime and civil security attacks which further destabilize the EU.

Moreover, citizens, whose changing priorities contributed to EU fragmentation, are sceptical \neg regarding the use of security measures and critical of the level of security. The EU is breaking apart.

More EU, More Security

In this world, the EU has achieved agreement on civil security risks and the need for decisive action. They pursue a long-term EU-level strategic approach and continue to set global standards, not only on data, but AI systems and other security concerns. For this, they receive global recognition.

Strong focus on collaborative R&I and implementation of innovative technologies increases competitiveness of EU companies, as well as ability to monitor, anticipate & take actions against security threats – strategic autonomy is achieved. This also results in robust critical infrastructure as well as interoperable systems. End users collaborate across borders. However, out-of-the-box ideas find it difficult to find footing.

All this is enabled and advanced by citizens' trust in the technologies, security measures and the EU as a whole to ensure a safe environment for the union. This comes with a daily struggle for strong independent oversight.

> One EU voice

security union

Transnational idleness

In this world, the EU member states have overcome their differences and achieved common civil security goals but have built less EU-wide capabilities, leaving them reactive to dynamic threats.

R&I for civil security is hampered by a limiting regulatory framework. The EU continues to set standards, but only in theory. Hence, mainly 'off-the-shelf' solutions are available to EU actors to address threats. This affects their negotiation power with outside suppliers and increases dependencies in security provision.

Strict data protection standards and a high level of bureaucracy impede the flexibility needed to increase resilience through collaboration, innovation and digitisation.

And although citizens demand higher levels of security, which they do not consider met, there is little acceptance for the use of technologies and security measures which may achieve this.