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Amina Khan
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The Taliban are driving Afghanistan's economic growth through domestic initiatives and foreign investment, focusing on infrastructure development, trade promotion, healthcare improvement, and tourism expansion, despite facing various challenges.



Restrictions on women's education and public life, harassment of journalists, and intimidation of former officials raise concerns about human rights in Afghanistan, prompting international calls for reform and inclusive governance.



Afghanistan's economic efforts have shown some progress, including increased revenue and exports, but Afghanistan's economy remains stagnant, facing challenges like poverty and a growing trade deficit, requiring international support for sustainable growth.

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Acronyms

AFJC	Afghanistan Journalists Center
AFN	Afghani (national currency)
AMC	Afghan Medical Council
ANDSF	Afghan National Defence and Security Forces
CRS	Congressional Research Service
CSTO	Comprehensive Security Treaty Organization
ETIM	Eastern Turkistan Islamic Movement
FES	Friedrich-Ebert-Stiftung
HRP	Humanitarian Response Plan
IEA	Islamic Emirate of Afghanistan
IOM	International Organization for Migration
IPC	Integrated Food Security Phase Classification
ISIL	Islamic State of Iraq and the Levant
ISKP	Islamic State Khorasan Province
OCHA	Office for the Coordination of Humanitarian Affairs
SIGAR	Special Inspector General for Afghanistan Reconstruction
SAO	Supreme Audit Office
TTP	Tehreek-e-Taliban Pakistan
UNAMA	United Nations Assistance Mission in Afghanistan
UNDP	United Nations Development Programme
UNHCR	United Nations High Commissioner for Refugees
UNICEF	United Nations International Children's Emergency Fund



UNODC	United Nations Office on Drugs and Crime
UNRP	Humanitarian Needs and Response Plan
UNSC	United Nations Security Council
WFP	World Food Programme
WHO	World Health Organization

Introduction

The Afghanistan Monitor, a regular publication by Friedrich-Ebert-Stiftung (FES) Pakistan, offers comprehensive insights into Afghanistan's political, economic, security, and humanitarian situation since the Taliban's resurgence. Its Seventh Edition focuses on developments from April 2024 to May 2024 and presents expert analyses.

Since August 15, 2021, the situation in Afghanistan has been constantly changing since the Taliban assumed power as the de facto authority. Throughout the past two and a half years, there has been a growing recognition of the Taliban's governing style, which can be described as a mix of authoritarian measures and selective pragmatism.

Although the Taliban have solidified their control across the nation, uncertainties remain regarding the quality of governance and the safeguarding of women's and human rights under their de facto rule. Additionally, concerns persist about potential security risks originating from Afghanistan.

Likewise, there are mixed perspectives on the Afghan economy. Some sectors show improvements, such as increased revenue collection and a strengthened value of the Afghan currency (Afghani). However, there

are also challenges, including a decline in humanitarian assistance, limited job opportunities, and the reported repatriation of Afghan refugees, primarily from Pakistan, which further worsens the economic situation.

Moreover, a troubling aspect that casts a shadow over the Taliban's claimed achievements is the ongoing violation of women's and human rights. Imposing constraints on women's access to education and employment not only infringes upon their fundamental rights but also undermines the international community's willingness to engage with the Taliban.

In a diplomatic bid to maintain relevance, the Taliban actively seek integration into the international community, signaling a notable departure from their isolation in the late 1990s. Despite establishing themselves as the de facto political power in Afghanistan, their formal recognition from the international community still needs to be achieved. Challenges persist in their efforts toward political and social unity, especially regarding inclusivity and the representation of ethnic minorities.

Despite improvements in Afghanistan's security situation, such as a decrease in terror attacks, the escalating threats from transnational terrorist groups like Al-Qaida, Islamic State Khorasan Province (ISKP), and

Tehreek-e-Taliban Pakistan (TTP) continue to pose significant risks to the stability of both Afghanistan and the broader region. While these groups present challenges to the Taliban, neighboring countries of Afghanistan also harbor concerns about them. Despite the Taliban's assurances to prevent Afghan territory from serving as a safe haven for international terrorist organizations, the recent report from the Special Inspector General for Afghanistan Reconstruction (SIGAR) reiterates concerns already highlighted by the United Nations Security Council reports on Afghanistan about the Afghan Taliban's tolerant position regarding terrorist groups like the Tehreek-e-Taliban Pakistan (TTP) and Al-Qaeda, raising serious doubts about the Taliban's commitment to effectively addressing the issue.

In summary, the Taliban are transitioning from insurgency to governance. However, their pursuit of international recognition as Afghanistan's legitimate representatives faces obstacles due to their reluctance to uphold commitments concerning human and women's rights, adherence to global norms, and assurances regarding counter-terrorism.

Political Situation

Since August 2021, the Taliban have effectively governed Afghanistan, employing a governance model heavily influenced by their interpretation of Sharia law. Initially, there needed to be more certainty about the form of governance they would adopt. However, the current interim setup resembles aspects of their rule in the 1990s, featuring a supreme leader, a prime minister, and the continuation of various ministries established previously. Notably, the Taliban have retained mainly the ministries from the previous government, except the Women's Ministry, which the Ministry of Vice and Virtue has replaced. In a significant development, in May, the Taliban integrated eight government institutions into ministries on the direction of Mullah Haibatullah Akhundzada, the supreme leader of the group. This administrative decision was motivated to undermine institutional inflation, minimize unnecessary expenditures, and ensure institutional effectiveness.²

Under these directions, the Supreme Audit Office (SAO) was integrated into the Directorate of Supervision and Prosecution of Decrees and Orders; the Afghanistan Food and Drug Authority was merged into the Ministry of Public Health as its deputy body; the Central and Provincial Laboratories for Oil and Gas were converged with the Revenue and

Customs Deputy of the Ministry of Finance; and the Central and Provincial Laboratories for Food were integrated into the Ministry of Public Health.³ Similarly, the Vocational Training Directorates have been given under the Ministry of Labor and Social Affairs; the National Olympic Committee has been integrated into the General Directorate of Physical Education and Sports - it has been renamed as the General Directorate of Olympics, Physical Education, and Sports; the Afghanistan Railway Authority has been given under the central authority of the Ministry of Public Works; and the Afghan Medical Council (AMC) has been transformed into the General Directorate of the Ministry of Public Health.⁴ After the merging of the mentioned departments, the total number of departments dropped to eleven—earlier, it was nineteen. Currently, the Taliban manage twenty-seven independent ministries to manage the country's affairs.⁵

Shortly after assuming control, the Taliban opted to suspend the 2004 Afghan constitution - which used to be the governing framework in the previous setup - and they assert that they are currently in the process of crafting a new constitution and legal framework grounded in Sharia principles.⁶ While the Taliban have prioritized specific objectives for their interim administration, such as enhancing governance guided by

Sharia law and addressing economic affairs, concerns linger as they function without a formal legal structure, i.e. a constitution. It is vital to highlight that the absence of an administrative framework introduces uncertainties regarding the future governance structure and the legal framework in Afghanistan. Addressing this issue, Afghan Interior Minister Sirajuddin Haqqani emphasized adopting and enforcing Sharia law as the foundation for the group's governance and legal framework during a ceremony in Khost in February.⁷ Later, in April, the Head of Legislation at the Ministry of Justice, Fazal Hadi Sahibzada, noted that the laws of the previous government have been annulled in the country, and seven new laws "including the Hearing of Complaints Law and the Law on the Collection of Beggars" have been ratified. He further stated that more than 160 laws - mainly related to the Ministry of Economy, the Supreme Court, Civil Affairs, and other institutions - have been finalized and shared with the Supreme Court and the Supreme Leader, Mullah Haibatullah Akhundzada, for final approval.⁸

The inclusion of minority and ethnic groups in the current Afghan interim government is a shared demand of both the international community and many Afghans. While the current administration is predominantly male and Pashtun-led, the Taliban have appointed nine members from non-

Pashtun ethnic communities - Uzbek, Tajik, and Hazara - to the cabinet.⁹ Additionally, in middle and lower-ranking public offices, the Taliban have retained individuals from the previous Afghan administration, totaling over 500,000, including 513 former ministers, governors, and deputy governors.¹⁰

However, the exclusion of women and members from various ethnic, political and civil societies from the policymaking processes raises significant concerns about the Taliban's commitment to establishing an inclusive, transparent, and responsible government.¹¹ Earlier in April, the Afghan Ministry of Justice banned political party activities, thus curbing their right to political will. Barkatullah Rasouli, the ministry spokesperson, noted that the Justice Ministry has removed the directorate concerning political parties from the ministry and its structures and has been sentencing individuals who are involved in any political activity. In this regard, under the direction of a military court's verdict, two individuals in the country have been sentenced to 15 years of imprisonment due to their political activities.¹²

As of now, in contrast to their past actions, the Taliban have achieved a degree of success in upholding peace and stability in Afghanistan. The group has encountered minimal resistance throughout the country and has

shifted away from violence. One of the prominent reasons behind this is that since the Taliban regained power, they have predominantly stayed cohesive under the firm leadership of Mullah Haibatullah Akhundzada, the group's supreme leader, who wields significant control and influence over governance and decision-making. While there have been some disputes regarding girls' education and the employment of women in NGOs, the group has primarily remained unified, with members pledging allegiance to Mullah Haibatullah Akhundzada. He has effectively centralized authority in governing Afghanistan, providing essential services and ensuring economic stability for the population.

However, in a rare development since the Taliban came into power, the group faced a public uprising against its country-wide ban on poppy cultivation. On May 3, a group of local farmers in Badakhshan province resisted the destruction of poppy fields by the Taliban's anti-narcotic forces. Citing the crisis, the Taliban formed a high-level investigation committee led by the Taliban's army chief, Qari Fassihuddin, to probe the protests, who negotiated and addressed the grievances of protestors.¹³ Later, nearly 2000 Afghan security forces continued to destroy the poppy fields in the province, and by mid-May, they had destroyed almost 40,000 acres of poppy fields in Badakhshan province.¹⁴

Badakhshan is usually a non-Pashtun province and was not under the Taliban's control during their previous rule in the 1990s. Thus, it may pose a severe challenge to the Taliban to maintain their authority. Furthermore, the *Afghanistan Development Update* by the World Bank noted in April that the opium ban in the country has caused an income loss of \$1.3 billion to Afghan farmers - nearly 8% of the country's GDP.¹⁵ Similarly, farmers in Helmand province say that the ban on poppy cultivation has exacerbated their economic challenges, and they are requesting the Taliban government to provide alternative crops. In this regard, the head of Helmand's Agriculture, Irrigation, and Livestock department said that his department is working on cultivating date palm orchards in the province as an alternative to poppy fields.¹⁶

Ongoing Infrastructure Projects

Since taking control, the Taliban have been actively pursuing avenues to promote economic growth and enhance infrastructure within Afghanistan. They are doing so by implementing domestic programs and efforts to attract foreign investment.

Therefore, at the beginning of this year, the National Procurement Commission of Afghanistan, under

the Afghan Ministry of Economic Affairs, approved 24 new projects across the country. With a total worth of almost 10 billion Afghanis, most of these projects are affiliated with the Interior Affairs, National Defense, and Public Health ministries. Notable among these initiatives are the construction of the Paranda Panjshir micro-hydroelectric dam, the completion of the Tori dam in Zabul province, and the establishment of nationwide road, electricity, and communication networks.¹⁷

Subsequently, in May, the office of Economic Deputy Prime Minister, Mullah Abdul Ghani Baradar announced the commencement of eight development projects worth 44 billion Afghanis. The projects, mainly in collaboration with the private sector, primarily include the construction of road infrastructure, the setting up of factories, and water management systems. These projects include the Herat-Ghor road construction, the construction of the second part of the Kotel Khaikhana road, the road from Charahi Shahid to Qasba, the road from the Maidan Hawaiee to the customs office in Kabul, the establishment of two pharmaceutical factories, a non-alcoholic beverage factory, and the Pashtun dam project.¹⁸

Moreover, locally, the Taliban has hosted several international exhibitions to introduce domestic

products to global markets. One such international exhibition took place in Kabul, where domestic Afghan products were exhibited in 800 booths—200 booths were managed by Afghan women. Speaking at the celebration of the Industrial Week at the exhibition, the acting Minister of Industry and Commerce, Nooruddin Azizi, said that in the past year, his ministry provided new or renewed licenses to nearly 2,000 manufacturing companies nationwide.¹⁹ Similarly, the Afghan Ministry of Agriculture, Irrigation, and Livestock organized an agricultural exhibition and farmers' festival in the same month. The exhibition featured 263 stalls, including 50 for women and entrepreneurs, featuring agricultural products from across the country.²⁰

Even various Afghan female entrepreneurs are trying to play their role in the Afghan economy, which, according to the UNDP, are "vital pillars of economic stability" of the country. In its three-year report on the challenges and resilience of Afghan women entrepreneurs, the UNDP noted that 73% of the respondents complained about travel restrictions without the company of a male guardian, whereas 43% of over 3000 surveyed women were made to take loans for their businesses. Subsequently, the UNDP stated that the number of employed women by age has reduced by 50% over the last year.²¹

Moreover, in an effort to encourage the return of professional and skilled individuals to Afghanistan, the Taliban minister for Mines and Petroleum, Shahabuddin Delawar, met with Amirzai Sangin, the former Minister of Communications and Information Technology of the previous setup. Apart from discussing the initiatives in Afghanistan's energy sector, the Taliban minister also discussed mining contracts, specifically those of the Mes Aynak copper mine, Zenda Jan cement in Herat, Shor Andam in Kandahar, and Jabal Saraj.²² Moreover, Shahabuddin Delawar said that the Chinese MCC company, which holds the mining contract of the Aynak copper mine, is interested in "investing in other major mines" in the country. Given this, the Taliban minister stated that his ministry could only allow the company to invest further if it agreed to conduct mineral processing inside Afghanistan.²³

In the health sector, the Taliban are also undertaking several steps to provide a multitude of health facilities. One of the main goals of the Taliban is to make Afghanistan free of polio, as it is one of the only two countries in the world with polio cases. In this regard, a four-day polio vaccination drive commenced on April 29 in 31 of the country's 34 provinces to provide vaccination to over 10 million children.²⁴ The remaining three provinces—Ghor, Daikundi, and Bamyan—will receive

the facility as soon as the weather conditions become favourable, as the provinces are facing heavy floods. Apart from providing polio vaccines, the Health ministry announced that it will provide vitamin A to children to increase their resistance against infectious diseases.²⁵

Moreover, to gain international support in eradicating polio and other health sectors, the Taliban met with representatives from the World Health Organization (WHO) and the United Nations Children's Fund (UNICEF) on May 6 in Kabul. During the meeting, Dr Hanan Balkhi, a representative from the WHO, expressed support for the organization in enabling a dialogue between Afghanistan and Pakistan's governments to create cooperation in the health area. She also noted that the Bill & Melinda Gates Foundation has allocated \$15 million for healthcare purposes in Afghanistan, whereas Saudi Arabia, Qatar, and the UAE have contributed \$3 million each. It is to be noted that the Bill & Melinda Gates Foundation has pledged \$500 million to Afghanistan and Pakistan to support polio eradication in the two countries.²⁶

Additionally, in the tourism sector, the Taliban are trying to increase the number of tourists in Afghanistan by giving professional tourism and hospitality training to people in the country. Even though the Taliban have been lacking recognition since

they arrived in Kabul in August 2021, there are still several tourists visiting the country due to the absence of war. In 2021, nearly 690 tourists visited Afghanistan, followed by 2,300 in 2022. However, the number increased to 7,000 in 2023, thus showing a consistent rise in the trajectory of foreign tourists in the country. According to the head of the Tourism Directorate in Kabul, Mohammad Saeed, most tourists are from China due to the country's regional proximity. Despite this, the country's tourism sector faces a lack of road infrastructure and the absence of any direct flight between Afghanistan and major tourist markets, such as China, India and Europe.²⁷

Humanitarian Situation

According to the Office for the Coordination of Humanitarian Affairs (OCHA), Afghanistan's humanitarian situation is "dire and requires urgent intervention" by the international community and donor countries to address humanitarian requirements. Therefore, uninterrupted assistance is critical to promote long-term stability and resilience among affected populations.²⁸

Despite numerous efforts and interventions, Afghanistan remains among the nations grappling with a dire humanitarian crisis. With a population of 43 million, the

country faces one of the most severe humanitarian challenges globally, mainly stemming from the long list of challenges, ranging from the protracted effects of decades of war to widespread displacement, food and poverty insecurity, natural disasters and climate change. According to OCHA, in 2024, an estimated 23.7 million people, including 5.9 million women and 5.4 million men, need humanitarian aid. Despite limited funding, bureaucratic barriers and efforts impacting humanitarian planning, Afghanistan's humanitarian partners released the 2024 Humanitarian Needs and Response Plan (HNRP) in December 2023.²⁹ The Response Plan prioritized life-saving assistance such as food assistance, safe drinking water, health care, education, water, sanitation, and hygiene (WASH) for 17.3 million extremely vulnerable individuals. In this regard, compared to a total requirement of \$3.06 billion for successful implementation of the Response Plan, only \$238 million—7 % of the total requirement—were received by the end of April 2024.³⁰ With funding constraints, the World Food Programme was compelled to cut rations to at least four million people, highlighting the critical need for sustained support and additional intervention from international humanitarian bodies.³¹

Afghanistan also stands as one of the most vulnerable countries to climate

change disasters, forcing the country to grapple with routine catastrophic events. Existing climate change models that help with predicting future carbon dioxide emissions and possible reductions in atmospheric concentration have shown that persistent uncontrolled increase in mean annual temperatures are anticipated to be far considerably higher than the recorded global average, adversely increasing the risk of drought. The annual likelihood of droughts may become a norm by the year 2030, in the Purview of this year's Humanitarian Needs and Response Plan, which acknowledges severe and unpredictable weather events and natural disasters caused by the effects of climate change. This unfavorable chain of causations will negatively impact people, households, infrastructure and agriculture, intensifying the risk of displacement towards already populated urban localities. Humanitarian agencies predict that natural disasters, in particular floods, landslides and earthquakes, could go on to affect the lives of 180,000 people.³²

On the 10th & 11th of May, Afghanistan's northeastern belt went on to experience severe rainfall and flash floods that impacted 21 districts across Badakhshan (5), Baghlan (10), and Takhar (6) provinces. As of now, reports indicate that 347 individuals have been confirmed dead and 1,651 injured. Around 7,800 homes

were either demolished or harmed, resulting in over 5,000 families being displaced, as reported by the de facto Ministry of Refugees and Repatriation. Apart from the destruction of roads, bridges, healthcare facilities, and public schools, agricultural lands and livestock were also affected.³³

The humanitarian situation in Afghanistan was further exacerbated as the number of internally displaced people increased. The Afghan deputy minister of Refugees and Repatriation, Abdul Rahman Rashid, said that as of May, there are 380,000 internally displaced people in Afghanistan. Most of the displaced people are those who returned from neighbouring states. According to the International Institute for Environment and Development (IIED), about half a million refugees returned to Afghanistan between October and December from Pakistan. Even though Islamabad planned to commence the second phase of repatriation of the Afghan Citizen Cardholders (ACC) in April, the decision was delayed till June 30, 2024.³⁴ The government of Pakistan announced that the "PoR cardholders will be sent back in the third stage of the program to expel foreigners residing illegally in Pakistan." According to UNHCR, there are now 3.1 million Afghan refugees in Pakistan - 1.35 million as PoR cardholders, 800,000 with Afghan Citizen Cards (ACC), and remaining residing illegally.³⁵

Human Rights and Women's Rights

Despite continuous warnings from the international community, the Taliban have failed to address concerns regarding women's and human rights adequately. Despite their initial promise to uphold women's rights in line with Islamic law and to support women's education and participation in public life, the group quickly reneged on these commitments after taking power.

Women

In March, the Taliban supreme leader, Mullah Haibatullah Akhundzada, issued a message saying that the Taliban would reinforce the strict punishment of flogging and stoning women to death for adultery. In his audio message, Haibatullah noted the group's "work did not end with the takeover of Kabul, it has only just begun."³⁶ After coming into power, the Taliban assured to not revert to their past rule's practice of suppressing women and girls. However, the current dispensation shows that the group is implementing a harsh interpretation of Sharia law and pays no heed to the demands of the international community vis-a-vis women's rights. Haibatullah says that the rights that the Afghan women are talking about "are against Sharia

and clerics' opinions, who toppled Western democracy".³⁷

Moreover, female students in Afghanistan still need to be allowed to attend school above the primary level. According to the United Nations Assistance Mission in Afghanistan (UNAMA), March 20, 2024, marked the commencement of the new academic year in Afghanistan. However, despite the repetitive calls from the international community to open educational institutions for girls, the Taliban continued their ban on girls' education above 6th grade. Similarly, the Ministry of Education's invitation for media participation instructed female journalists not to attend the ceremony due to a "lack of proper place(s)" for women.³⁸

Responding to the findings of the report, the Taliban's spokesperson, Zabihullah Mujahid, said the "UNAMA report is repetitive and propaganda that is unsubstantiated. The Sharia rights of the people, including women and men, are secured and not lost."³⁹ It should be noted that UNAMA reported a decrease in the incidents of hijab enforcement since January 2024.⁴⁰

Journalists

The UNAMA also reported that the situation for journalists in Afghanistan is "mixed". Some media journalists believe it has improved due to

increased access to information, the appointment of spokespersons at the provincial level, and the establishment of WhatsApp groups to distribute information. Even with these improvements, there are challenges that media workers are facing due to financial constraints, the risk of arbitrary detention, and instructions issued by provincial authorities, such as prohibiting media outlets from using images of official meetings and other events.⁴¹ Therefore, Richard Bennett, the United Nations Human Rights Council's Special Rapporteur for Afghanistan, called journalism in Afghanistan "essential" and urged the "international community to provide support to Afghan journalists".⁴² It is to be noted that as per the Reporters Without Borders (RSF), Afghanistan's Press Freedom ranking has fallen 26 places - from 152nd to 178th - in May 2024, citing deaths and arrests of journalists.⁴³

On World Press Freedom Day, i.e. on May 3, the UN Women Division noted that 80% of the Afghan female journalists were forced to leave their jobs as they faced fear and intimidation. Earlier, the Afghan Journalists Center announced that since coming into power, the Taliban have given 17 directives, such as banning women from working on TV and radio, making it compulsory for female journalists to cover their faces, and separating the roles of women and men in media offices.⁴⁴

Former Afghan Officials

After coming into power, the Taliban announced a general amnesty to all, including the civilian and military officials of the previous administration. However, UNAMA reports that under the Taliban's rule, the former government and ANDSF officials are facing threats, including torture, ill-treatment, intimidation and extrajudicial killings. In the first three months of 2024, UNAMA Human Rights reported 38 instances of arbitrary arrests and detentions, 10 cases of torture, ill-treatment, and verbal threats, and four extrajudicial killings of government officials and ANDSF personnel of the previous administration.⁴⁵

Economic Situation

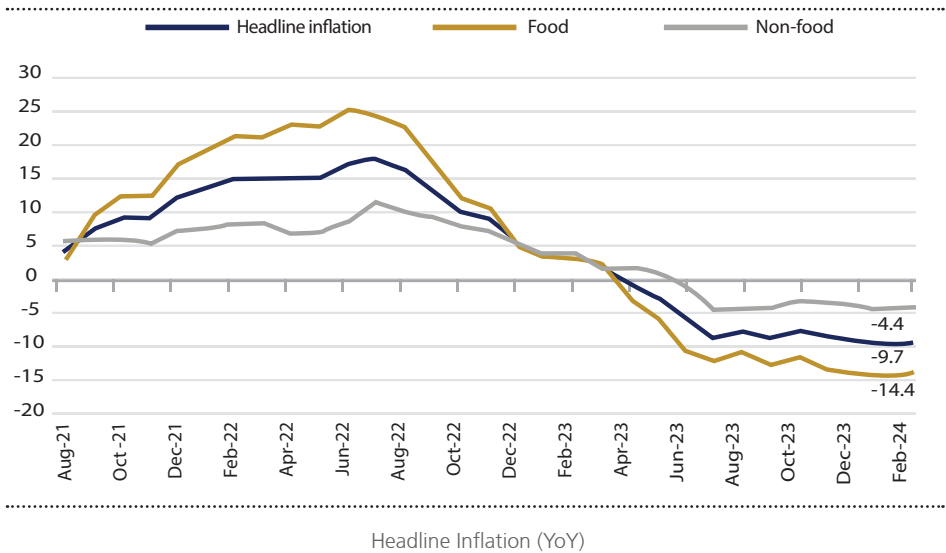
Since August 2021, the Taliban have shifted their focus to the economy, aiming to increase revenue collection, raise the market value of the Afghani currency, and improve trade relations with neighboring and regional countries. Nevertheless, the World Bank noted that the Afghan economy remains stagnant, with a rising deflation. Over the past two fiscal years, Afghanistan's GDP contracted by 26%, mainly due to poverty, food insecurity, rising unemployment, and underdevelopment. Though there are better supply conditions, a reduction in off-budget transfers, a ban on

opium cultivation, and inadequate fiscal and monetary measures have resulted in an economy adapting to decreasing demand, thus causing deflation. Moreover, damages caused by natural disasters and the return of refugees have put an extra burden on the already sluggish Afghan economy.⁴⁶

Similarly, the Afghan private sector has experienced an increase in operational companies; however, more than a third of these companies still need to be fully utilized, and nearly 8% of such companies have ceased to work. Similar is the situation of the Afghan banking sector, where the decreasing frequency of asset deposits, coupled with the outstanding international payments and shift towards

Islamic banking, has increased the dependence of the Afghan economy on cast and non-documented ways of payments.⁴⁷

Moreover, due to a decline in the food (-14.4 per cent YoY) and non-food (-4.4 per cent YoY) prices, the headline inflation decreased to -9.7 percent on a year-on-year basis by February 2024. Similarly, the core inflation, which excludes volatile food and energy prices, also plummeted to -3.0%. This downward trajectory is associated with an increased supply and a limited demand in the food sector, coupled with the appreciation of the AFN against the US dollar in 2023, thus contributing to declining import costs.⁴⁸

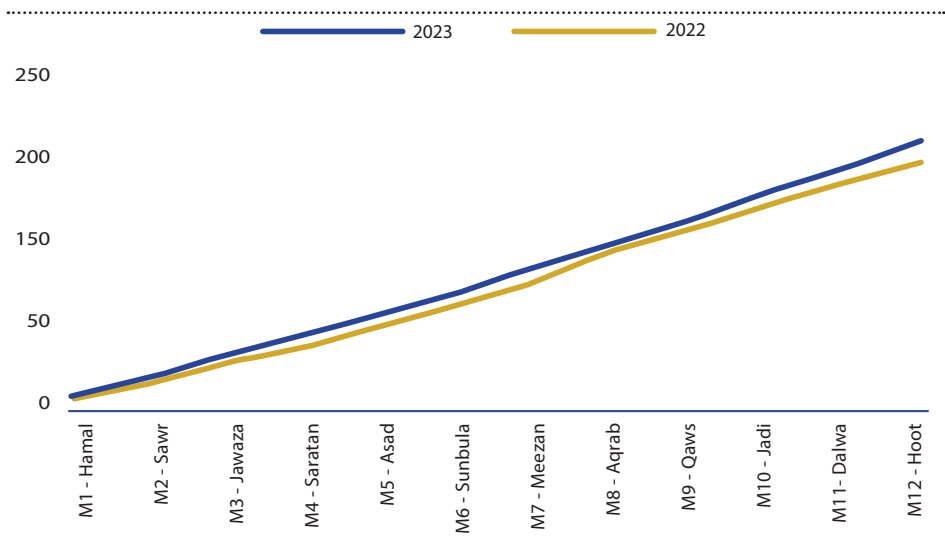


Source: National Statistics and Information Authority (NSIA)

Revenue Collection

Furthermore, the Taliban have been successful in meeting their revenue collection target for the fiscal year 2023, which was targeted at AFN 210 billion. Owing to the increased import taxes and non-tax revenues, for the first time, the Taliban were able to exceed the allocated target

by collecting AFN 210.7 billion for the fiscal year 2023 - a total increase of 9% as compared to the fiscal year 2022. Even though the group tries to enhance its domestic revenue collection base, the dependence on tax collection from imports and non-tax revenues could pose a challenge for sustainable revenue collection.



Cumulative Monthly Revenue Collection and its Comparison (AFN Billions)⁴⁹

Source: Ministry of Finance⁵⁰

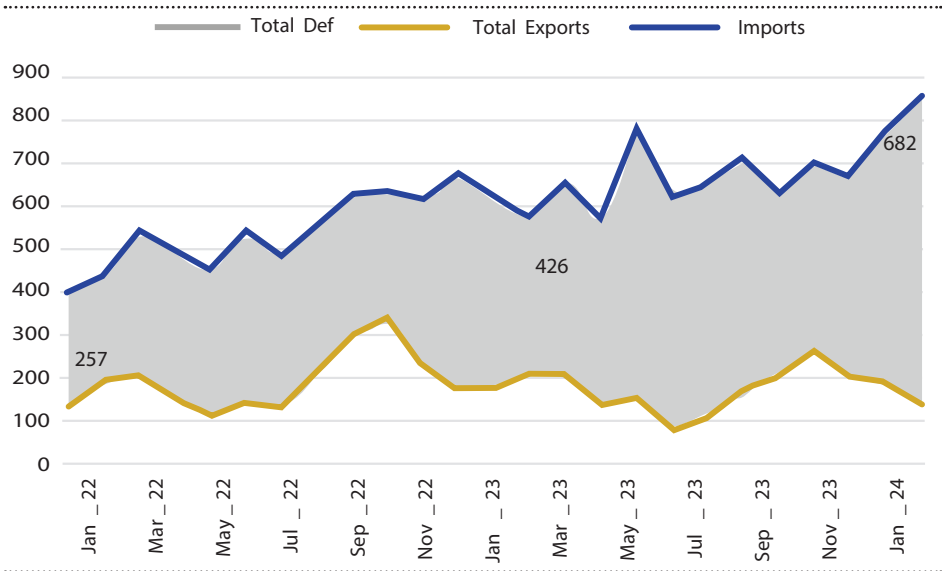
The inland revenue collection increased by 13% - reaching AFN 102.6 billion - for the fiscal year 2023, constituting 49% of the total revenue collections as compared to 45% for the fiscal year 2022. This rise is mainly attributed to strict compliance and an expansion in the tax base. In this regard, the Taliban facilitated the business community by cutting industries' Business Receipt Tax (BRT) rate by half to 2 percent, tax

rates for small businesses were cut-down from 1.5 percent to 0.5 percent, and pre-2016 arrears were slashed. Similarly, the Taliban also abolished the penalties for overdue driving permits and vehicle registrations.⁵¹

Similarly, in the trade sector, with a steady export, Afghanistan's imports increased, contributing to a continuously increasing trade deficit

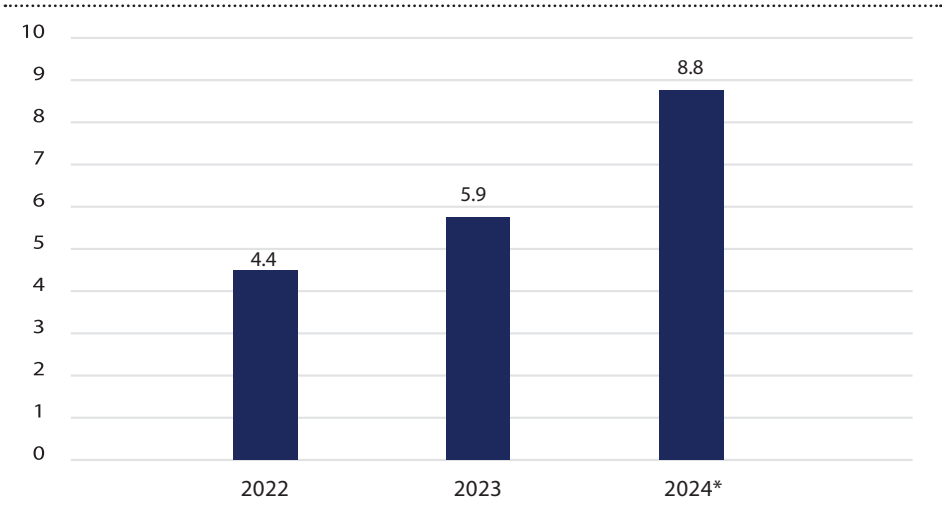
for the fiscal year 2023. In January 2022, the Afghan economy was facing a deficit of \$256 million and \$426 million in January 2023; however, in January 2024, the deficit increased by

60% to \$682 million. Thus, the annual trade deficit increased to \$5.9 billion in 2023 and is projected at \$8.8 billion for the fiscal year 2024.⁵²



Monthly Trade Deficit (\$Million)

Source: Automated System for Customs Data (ASYCUDA)⁵³



Annual Trade Deficit (\$Billion)

Source: The World Bank⁵⁴

Afghan Currency - the Afghani

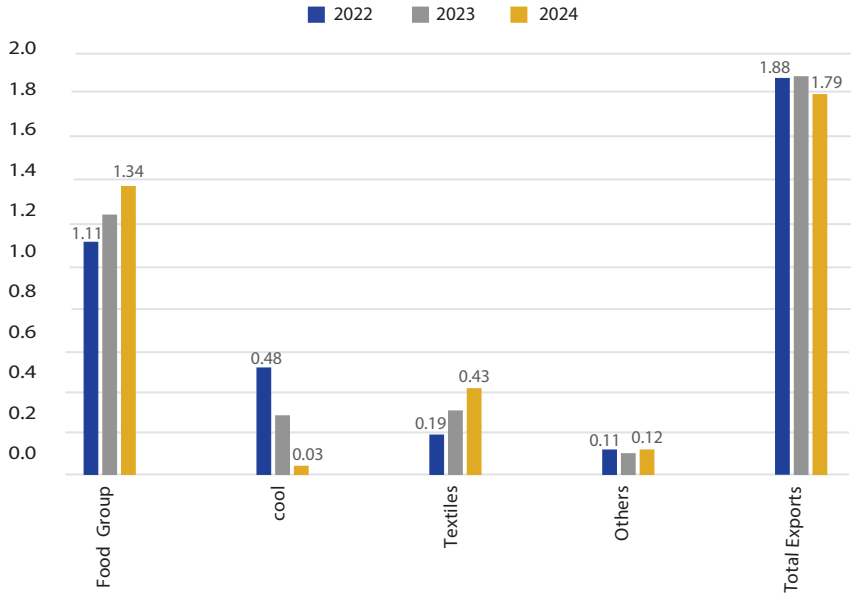
However, the appreciation in the Afghan currency - the Afghani (AFN) - against notable currencies covered the trade deficit. Due to \$1.8 billion by the UN in cash shipments and almost \$2 billion in foreign remittances, the Afghani (AFN) appreciated by 27.1% against the US dollar.⁵⁵ By December 26, 2023, the Afghani had appreciated 22.8% as compared to August 15, 2021, at 70.13 against the US dollar. However, by the end of March 2024, the Afghani depreciated by 2%, reaching 71.6 against the US dollar. Still, the exchange rate shows an appreciation of 20.4% in the Afghani's value as compared to that on August 15, 2021.⁵⁶

Trade

In 2023, Afghanistan's trade witnessed a slight increase of 0.39% in its exports as it reached \$1.9 billion, mainly due to a rise in exports of food and textile products. During the year, there were some notable fluctuations, such as exports increased in the months of January, May, and December; however, in the other months, the trend remained stagnant or declining. Even though January 2023 experienced an increase of 30% in year-on-year growth, there was a decline in the growth in January 2024, as it fell down to 5% on a year-on-year basis.

For Afghanistan's products, Pakistan and India are the primary export markets, with 54% and 31% shares, respectively, in 2023. However, in January 2024, Pakistan's shares fell down to 45%, and India's increased by 34%. Similarly, exports to Pakistan contracted by 15% from \$1.2 billion in 2022 to \$1.0 billion in 2023, owing to a decrease in the export of coal and food, which make up 70% of Afghanistan's exports to Pakistan. Moreover, in 2023, coal and food exports to Pakistan fell by 87% and 18% on a year-on-year basis, respectively. However, this drop in the exports was compensated by an increase in Afghanistan's food exports to India, which increased by 22% on a year-on-year basis in January 2024.

In 2023, Afghanistan's coal exports plummeted by 46%, contracting from \$476 million in 2022 to \$257 million. Similarly, in January 2024, coal exports dropped to \$3.9 million as compared to \$29.6 million in January 2023, thus showing a decrease of 87% on a year-on-year basis. However, this decrease in coal exports was recovered due to growth in food and textile exports. In 2023, food exports increased by 13% to \$1.25 billion and surged by 7% in January 2024. Similarly, textile exports also increased by 46% to \$281 million in 2023 and a 52% year-on-year basis in January 2024.

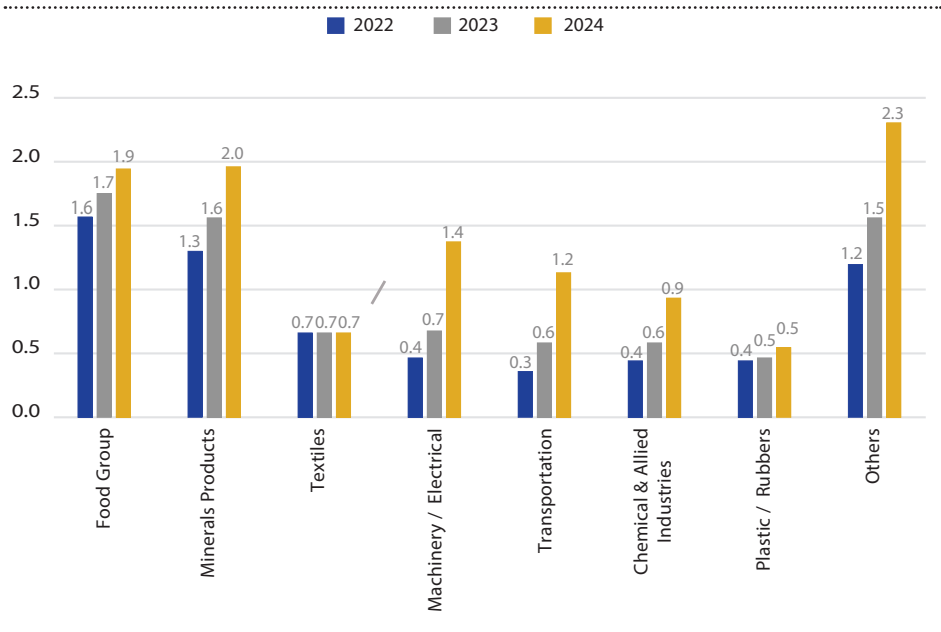


Exports Trend (\$billion)

Source: World Bank

Moreover, Afghanistan imports increased by 23% to \$7.8 billion in 2023 from \$6.3 billion in 2022. In 2023, import growth in Afghanistan saw a consistent surge, with January and May indicating the highest rates at 52% and 73%, respectively. In January 2024, imports witnessed a surge of up to 37% on a year-on-year basis to \$826.3 million from \$603.6 million in January 2023. During 2023, Afghanistan’s import market experienced a shift in its import patterns, i.e. the import of secondary commodities (machinery, transportation, and chemicals) increasing faster as compared to primary commodities (food, textiles, and minerals).

In 2023, food, minerals and textile imports accounted for 51% of the total imports, with food accounting for 22%, mineral products comprising 20%, and textile imports making up 9%. Moreover, in 2023, there was a significant year-on-year growth in the import rates of machinery, transportation, and chemicals, with 63%, 85%, and 37%, respectively. Moreover, in January 2024, there were even higher import rates of 111%, 106%, and 59% for the three products. For Afghanistan, Iran is the highest import source, with 32% of the country’s total imports. It is followed by Pakistan, China and the UAE, with 14%, 5% and 27% respectively for January 2024.



Imports Trend (\$billion)

Source: World Bank

Foreign Policy

Since assuming control, the Taliban have engaged with neighboring countries and the broader global community through various means. Despite the absence of international recognition, the Taliban persist in viewing themselves as equal and engaged members of the global community. Their continuous interactions encompass engagements with diplomatic representatives in Afghanistan, hosting foreign delegations, international travel, and participation in a range of regional and global forums.

Given their continuous engagements, Noorullah Noori, the acting Minister

of Borders and Tribes, said that the Islamic Emirate is in no haste to seek recognition, as “the country will be recognized tomorrow or the day after,” and rather it is more interested in engaging with the international community. Similarly, while talking about the invitation to the “Russia-Islamic World: Kazan Forum,” the Afghan Deputy Prime Minister for Political Affairs, Mawlawi Abdul Kabir, said in a public gathering in Parwan province that “Islamic Emirate was invited and representatives of the Islamic Emirate were present there, so what does recognition mean?”⁵⁷ On May 27, the Russian ministries of Justice and Foreign Affairs presented a proposal to Russian President, Vladimir Putin, suggesting the

removal of the “Taliban” from the country’s designated terrorist groups. In this regard, the Russian Special Representative for Afghanistan, Zamir Kabulov, indicated substantial institutional support for this proposal. He said that the “Taliban government has come a long way towards being recognized;” however, there are still a few hurdles to overcome, after which the Russian leadership will make a decision.”⁵⁸

Earlier, Suhail Shaheen, the head of the Islamic Emirate’s Qatar-based Political Office, said that the participation of the Islamic Emirate’s representative in international meetings is imperative for the group to present ground realities in Afghanistan and to clarify its position on various issues.⁵⁹ Earlier, at the United Nations (UN) level, Afghanistan’s voting rights have been suspended allegedly due to the country’s unpaid UN membership fee of \$200,000 annually for the last four years. Apart from this technical challenge, the Afghan Taliban have requested the UN to hand over Afghanistan’s seat at the global forum to the representative of the Islamic Emirate of Afghanistan (IEA), as they believe that the current Afghan representative at the UN is neither the representative of the people of the country, nor the current Afghan government.⁶⁰

Since August 2021, two Doha meetings have been concluded with

apparently no concrete results vis-a-vis the Afghan Taliban, mainly due to the group’s absence from the forum. However, for the third Doha conference, Mohammed bin Abdulaziz bin Saleh al-Khulaifi, Minister of State for the Foreign Affairs of the State of Qatar, met with the deputy prime minister for economic affairs, Mullah Abdul Ghani Baradar, to request the Taliban’s participation at the forum. According to the office of the Minister of State for the Foreign Affairs of the State of Qatar, the meeting would have been constructive if the group’s representative had participated.

In this regard, Zabihullah Mujahid, the spokesperson of the Islamic Emirate, said the group is “reviewing it, and if it is in Afghanistan’s interest, we will undoubtedly participate. However, if Afghanistan’s conditions are not considered and these meetings are held to portray Afghanistan as chaotic and disorganized, we will certainly not participate.”⁶¹ However, on May 29, the Afghan Ministry of Foreign Affairs held a conference to discuss the stance of the Afghan Taliban over the Doha meeting, during which most of the participants felt that the third Doha meeting can bring results if positive changes are met.⁶²

Furthermore, from May 4 to 5, representatives of the Islamic Emirate participated in the 15th summit of the Organization of Islamic Cooperation

(OIC) in Gambia, led by Abdal Qahar Balkhi, the spokesperson for the Afghan Foreign Ministry. The final resolution of the summit stressed upon the importance of an inclusive government, women rights, and support for Afghan people in the country.⁶³

Similarly, on April 24, the group entered the first round of discussions with the UN, NGOs and donor organizations over the issue of climate change impact on Afghanistan in Kabul. Currently, Afghanistan is ranked as one of the countries that are least prepared to deal with the effects of climate change and extreme weather conditions. Therefore, the Country Director of the Norwegian Afghanistan Committee (NAC), Terje Watterdal, said that it is imperative to “de-politicize key development issues, such as climate change”.⁶⁴

Security Situation

The security landscape in Afghanistan has shown remarkable improvement following the Taliban assuming governance. This notable shift can mainly be credited to the halt in insurgency operations previously carried out by the Taliban. Nevertheless, as per its Quarterly report to Congress in March 2024, SIGAR noted that militant groups in Afghanistan “have leveraged poor economic conditions, lax governance

in Afghanistan, and a sophisticated network to recruit, train, and sustain an expanding cadre of fighters.”⁶⁵ The report recognized the Taliban’s efforts against ISKP and other terrorist groups but noted the group’s tolerance towards TTP and Al-Qaida.

Regarding the threat of ISKP, the report quoted the U.S. CENTCOM Commander, General Michael E. Kurilla, who testified before the Senate Armed Services Committee in March that the terrorist group “retains the capability and will to attack U.S. and Western interests abroad in as little as six months and with little to no warning,” Similarly, the UN also considers the group as the “greatest threat within Afghanistan” having the “ability to project a threat into the region and beyond.”⁶⁶

ISKP has conducted terrorist attacks against Russia, Iran, Pakistan, and Türkiye, with the most notable in Russia on March 22, 2024. The attack resulted in the killing of more than 130 people and resulting in the injuries of nearly 200 people. Similarly, in Kerman, Iran, two attacks in January 2024 are considered to be the deadliest since 1989, which resulted in the death of nearly 100 individuals. Likewise, ahead of the General Elections in Pakistan in February 2024, the ISKP targeted politicians in the country, thus causing the death of more than 75 people.⁶⁷

Since their arrival in Afghanistan in August 2021, the Taliban have been consistently denying the operations of a foreign terrorist group on Afghan soil. However, the attackers of the Iran and Pakistan attacks reportedly received training and assistance from Afghanistan. In February, the Collective Security Treaty Organization (CSTO) noted a rise in the presence of ISKP and TTP fighters along the Afghanistan-Tajikistan border.⁶⁸ Currently, as estimated by the Congressional Research Service (CRS), ISKP's size ranges from 2000 to 5000 fighters.⁶⁹

Similarly, the report also mentioned TTP, which aims to regain territorial control in Pakistan. Currently, there is an estimated range of 4000 to 6000 TTP fighters, mostly based in Eastern Afghanistan, thus posing a significant hurdle in Pakistan's efforts to secure its border with Afghanistan and deal with domestic militancy. Moreover, it is still unclear the extent to which the Afghan Taliban are willing to take action against TTP, thus allowing it to operate against Pakistan with greater mobility. This has also been highlighted by the Armed Conflict Location and Event Data Project (ACLED) that TTP and its affiliates conducted 120 attacks against the security forces of Pakistan between January 1 and March 22, 2024. Later, on March 26, TTP targeted Chinese engineers working at the Dasu hydropower plant, resulting in the

death of 5 Chinese nationals and a Pakistani security guard.⁷⁰

Additionally, SIGAR notes that Al-Qaida in Afghanistan remains weakened even though it has maintained safe havens in the country. According to the UN Sanctions Monitoring Team, Al-Qaida is unable to "provide strategic direction to the broader organization" and "cannot at present project sophisticated attacks at long range." However, the monitoring team noted that with the help of Al-Qaida in the Sub-continent, Al-Qaida in Afghanistan has established eight new training camps, a stockpile weapons base, and five madrassas in the country.

Taliban Security Forces

In 2023, the Taliban's Army Chief of Staff, Fasihuddin Fitrat, noted that the group aims at creating an army of 200,000 personnel based on the needs of the country. Thus, as of March 5, 2024, the Afghan army's strength stands at 172,000 fighters, showing a "gradual progressing". Similarly, the police strength in Afghanistan stands at a total of 210,745 personnel.⁷¹

Earlier, as of March 23, 2024, the Afghan Taliban's combined military and police forces stand at 384,000 personnel - a number higher than the strength (300,699) of the Afghan National Defence and Security

Forces (ANDSF) under the previous administration. The most notable aspect of the current Taliban forces is the presence of nearly 2000 Afghan women, who are hired even after the strict restrictions imposed by the group on women. These women security personnel help with security operations, carry out house visits, operate women's prisons, and detain those who violate the Taliban's dress code.⁷²

Opinion Corner:

Afghanistan's Security Landscape and the Presence of Multiple Terrorist Groups

Khalid Pashtoon

Afghanistan has long been a battleground for various terrorist groups from different parts of the world, significantly impacting its security and stability. The Taliban's return to power in 2021 has not quelled the activities of groups like Al-Qaeda and the Islamic State Khorasan Province (ISKP). These groups operate with varying degrees of autonomy and are often in direct conflict with one another, adding to the country's instability.

Al-Qaeda maintains a presence through its historical ties with the Taliban, posing a global threat by potentially planning international attacks. ISKP, on the other hand, focuses on establishing a broader caliphate in Central and South Asia, targeting civilians and religious minorities within Afghanistan. Other groups, such as Tehrik-i-Taliban Pakistan (TTP), East Turkestan Islamic Movement (ETIM), and the Islamic Movement of Uzbekistan (IMU), also

exploit Afghanistan as a base for their operations, affecting neighboring countries.

IMU and other militant activities spilling over their borders. The presence of these groups hampers Afghanistan's internal stability, disrupts daily life, and hinders economic development. The international community's counter-terrorism efforts, combined with diplomatic and humanitarian initiatives, aim to stabilize the region, but the complex and fluid security environment presents ongoing challenges. Regional cooperation and comprehensive strategies are essential to address these multifaceted threats and foster long-term peace and stability in Afghanistan and its neighboring regions. Pakistan faces cross-border terrorism from TTP, while Iran contends with refugee flows and drug trafficking. China is concerned about Uighur militants linked to ETIM, threatening its interests in Xinjiang and beyond. The Central Asian republics, especially Uzbekistan and Tajikistan, are wary of IMU and other militant activities spilling over their borders.

The presence of these groups hampers Afghanistan's internal stability, disrupts daily life, and hinders economic development. The international community's counter-terrorism efforts, combined with diplomatic and humanitarian initiatives, aim to stabilize the region,

but the complex and fluid security environment presents ongoing challenges. Regional cooperation and comprehensive strategies are essential to address these multifaceted threats and foster long-term peace and stability in Afghanistan and its neighboring regions.

{The writer is a member of the Afghan parliament (wolesi jirga)}

Pakistan-Afghanistan Ties: Recent Issues

Amb (Retd) Syed Abrar Hussain

An Afghan president used to call Pakistan and Afghanistan conjoined twins. And it is so true. Both countries have to live together whether they like it or not. So, despite many ups and downs in their bilateral ties, they need to understand that any disruption in their relations will be painful to both of them. Hence, they need to think strategically and cooperate with each other.

It was with this clear concept that Pakistan always supported Afghans whenever they were in crisis and whenever there was a war in Afghanistan. Pakistan hosted millions of Afghan refugees for several decades because of the instability in Afghanistan. But now that the country is at peace, it is only fair that at least the undocumented immigrants should return and contribute towards the development of their homeland.

Pakistan still hosts around 2.7 million Afghans and is also engaged in the resettlement of Afghan refugees in third countries. However, Pakistan's security concerns are the main reason behind its recent decision to expel illegal immigrants.

It is unfortunate that terrorist attacks in Pakistan have surged since the Taliban's takeover of Kabul. These attacks rose by 28% in 2022 and a staggering 79% in 2023. Most of them have been staged by TTP, whose leaders are based in Afghanistan. According to the UN Security Council's Analytical Support and Sanctions Monitoring Team, the "TTP benefited the most of all the foreign extremist groups in Afghanistan from the Taliban takeover". The surge in terrorist activities in 2023 led to a significant rise in the casualties of security personnel, which hit an eight-year high. The worst incident of terrorism was the TTP attack on a mosque in Peshawar's police lines, which claimed nearly a hundred lives.

Pakistan has time and again expressed serious concerns about the safe havens and liberty of actions available to TTP in Afghanistan. However, Kabul has been either unwilling to curb the group's presence there or does not have the capacity to do so.

In the given situation, Pakistan felt that it was left with no other option but to strictly manage its borders, expel all those staying illegally in the country, and mount pressure on Kabul, raising the cost of its non-cooperation over TTP. It was against this backdrop that Pakistan took some strict measures. However, Pakistan's move to repatriate illegal and undocumented immigrants has raised

many concerns, especially among Afghans. The TTA government has rejected this policy, although Afghans generally admit that Pakistan has the legal right to deport all those staying illegally, and this right cannot be contested. However, they feel that the decision to expel illegal immigrants, mainly Afghans, seems to have been made in haste and without proper planning. They raise the concern that the Afghanistan government might not be able to facilitate all returning Afghans, and this may create a humanitarian crisis. This perception has generated misconceptions for which there should be a counter-narrative in both countries.

Moreover, the issue of illegal Afghans should be addressed through a comprehensive approach. While it is pertinent that Pakistan outlines its policy clearly, international organizations such as UNHCR, IOM, and others can foster constructive engagement and cooperation to leverage the pull factors in Afghanistan. One of the major pull factors, i.e. peace, is already there. Other pull factors can include a place for residence, a piece of land, some money to start a business, and some quotas for refugees in government jobs. Besides, scholarships for returning students in Afghan educational institutions could be announced. Incentives for Afghan refugees can also be created in other countries as a comprehensive approach.

Another recent development in Pakistan-Afghanistan relations was the measures taken by Islamabad in the context of Afghan transit trade. Afghan transit trade through Pakistan amounted to \$4.5 billion in 2021-22. Surprisingly, it jumped to \$7.3 billion in 2022-23. A thorough investigation into this issue revealed that Afghan transit trade items exceeded Afghan needs, and goods worth \$2 billion-plus were smuggled back into Pakistan. Consequently, Islamabad placed a ban on 212 smuggling-prone goods, introduced a 10% processing fee and bank guarantees equal to duties and taxes, and decided to select 25% consignments for screening.

In yet another development, Pakistan recently made visas mandatory for drivers of all commercial vehicles crossing Pakistan-Afghanistan border. This means truck drivers carrying goods from Afghanistan, who hitherto would cross over into Pakistan only by showing some sort of personal ID to the officials, would now have to show their passports with visa stamps. Around mid-January 2024, officials of the two countries at the Torkham border held a meeting and agreed that passports and visas should be required for crossing the border from both sides. Subsequently, business forums of both countries are demanding a streamlining of the visa process for drivers of commercial vehicles, suggesting that the Pakistani and

Afghan governments issue red passes to facilitate easier movement.

For several decades, Pakistan has been making efforts to improve economic relationships by facilitating Afghan transit trade and providing economic assistance packages covering health, education, infrastructure, etc. It has also been providing thousands of scholarships to Afghan students for higher education in Pakistani universities, besides capacity-building courses for Afghan officials in several areas.

Pakistan believes in non-interference and respects Afghan decisions regarding their political system, religious beliefs, and national customs. Nevertheless, the recognition of the Taliban government is an issue that is still pending because Pakistan prefers to do it in consultation with other regional countries.

However, now that a newly elected government in Pakistan is going to take over in the next few days, it is important to make a new beginning in relations with Afghanistan. Hence, the importance of collaborative efforts between Pakistan and Afghanistan with cooperative measures, efficient border management, and a conducive trading environment are paramount.

As the bottom line, let me repeat that we have to live together whether we like it or not. And any instability in our countries will impede development.

Let us remember that our commonalities exceed our differences. So let us think strategically, join hands to fight terrorism, and cooperate for the peace, progress, and prosperity of our peoples.

{The writer is former Ambassador of Pakistan to Afghanistan}

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ABOUT THE AUTHOR

Amina Khan is the Director of the Centre for Afghanistan, Middle East & Africa (CAMEA) at the Institute of Strategic Studies (ISSI), Islamabad, where she oversees research and advocacy-related work on all facets of CAMEA. Before this, she served as a Research Fellow and a Senior Research Fellow at the ISSI, focusing on Afghanistan and the Federally Administered Tribal Areas (FATA). Over more than 15 years, she has published extensively on Afghanistan and has presented her research at multiple national and international forums. She is also the author of three edited books, *The Covid Challenge and its Impact on the Middle East and Africa* (2021), *The Evolving Situation in Afghanistan: International and Regional Perspectives* (2022), and *Pakistan's Strategic Frontiers* (2023).

A recipient of the OSI/FCO/Chevening Scholarship 2009-2010, Amina has a Master's degree in Democracy, Politics and Governance (DPG) from Royal Holloway University of London. She also has a Master's degree in Defense and Strategic Studies (DSS) from the Quaid-e-Azam University Islamabad (2005). She has been a Visiting Fellow at the Stiftung Wissenschaft und Politik (SWP) in Germany. Currently, she is pursuing her doctoral degree from Quaid-e-Azam University.

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Responsibility for content and editing:

Felix Kolbitz | Country Director
Hamayoun Khan | Program Advisor

Contact/Order:

✉ info.pakistan@fes.de

☎ +92 51 2803391-4

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Friedrich-Ebert-Stiftung (FES) is the oldest political foundation in Germany. The foundation is named after Friedrich Ebert, the first democratically elected president of Germany.

FES Pakistan Office was established in 1990, though the cooperation with national institutions of Pakistan had already commenced during the middle of the 1980s. Based on its commitment to the basic values of social democracy including peace and social justice, FES-Pakistan formed partnerships to carry out activities for promoting dialogue involving state institutions, political parties, social partners, civil society actors, opinion leaders and citizens.

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The Taliban are pursuing economic growth and infrastructure development in Afghanistan through domestic programs and foreign investment. They have approved new projects, including dam construction, road networks, and factories. International exhibitions are being held to promote domestic products. The Taliban are also working to improve healthcare, including a polio vaccination drive and cooperation with international organizations. Additionally, they are promoting tourism, with a rise in foreign visitors, despite challenges in infrastructure and transportation.



The Taliban's actions have raised concerns regarding the protection of women's and human rights in Afghanistan. Despite initial assurances, restrictions on women's education and participation in public life remain in place. Additionally, journalists face challenges in carrying out their work, and former government officials have experienced intimidation and violence. The international community has expressed its concerns and encourages the Taliban to take steps to address these issues and promote a more inclusive and stable society.



The Taliban have made efforts to revitalize Afghanistan's economy, with a focus on revenue collection, currency stabilization, and trade enhancement. Despite these efforts, the economy remains stagnant, with a 26% contraction in GDP over the past two fiscal years. The country faces challenges such as poverty, food insecurity, and unemployment. However, there have been positive developments, including increased revenue collection, improved trade relations, and growth in exports. The Taliban have also implemented measures to support businesses, such as tax cuts and reduced penalties. Nevertheless, the economy continues to face significant challenges, including a growing trade deficit and dependence on imports. International support and cooperation are crucial to addressing these challenges and promoting sustainable economic growth in Afghanistan.