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Amina Khan
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Introduction

The *Afghanistan Monitor*, a periodic publication by Friedrich-Ebert-Stiftung (FES) Pakistan, provides an in-depth analysis of Afghanistan's political, economic, security, and humanitarian landscape since the Taliban's return to power. Its tenth edition, covering January to March 2025, offers expert insights into key developments during this period.

Since August 15, 2021, Afghanistan has undergone significant transformations under Taliban rule. Over the past three and a half years, their governance has faced increasing scrutiny, characterised by authoritarian policies tempered with selective pragmatism.

Despite consolidating nationwide control, the Taliban continue to grapple with uncertainties regarding governance quality, in-group cohesion, and their commitment to protecting women's and human rights. Additionally, concerns over potential security threats originating from Afghanistan add to the challenges.

The Afghan economy presents a mixed picture. While improvements such as enhanced revenue collection through tax and non-tax revenues, these gains are overshadowed by persistent difficulties, such as a constant three-month depreciation in Afghani currency (AFN). Reduced humanitarian aid and limited employment opportunities exacerbate existing hardships.

One of the most pressing issues undermining the Taliban's claimed achievements is their continued violation of women's and human rights. Restrictions on women's access to education and employment not only infringe on fundamental rights but also deter international engagement with the Taliban.

In pursuit of greater global legitimacy, the Taliban have shifted away from their isolated stance of the 1990s, seeking deeper integration into the international community. However, they have yet to gain formal recognition. Their efforts to foster political and social unity remain challenged, particularly in ensuring inclusivity and representation of ethnic minorities.

Political Situation

Since their takeover in August 2021, the Taliban have governed Afghanistan under a system deeply rooted in their interpretation of Sharia law. Initially, the structure of their government remained uncertain. However, the current interim administration closely resembles their 1990s regime, featuring a supreme leader, a prime minister, and the retention of several ministries from the previous government. Notably, the Women's Ministry has been replaced by the Ministry of Vice and Virtue, while most other ministries remain unchanged.

Soon after taking power, the Taliban suspended the 2004 Afghan constitution, which had previously guided the country's governance. The Taliban claim to be drafting a new constitution based on Sharia principles. While the interim administration focuses on governance under Sharia and addressing economic challenges, the lack of a formal legal framework raises concerns about Afghanistan's future governance and judicial system.¹

Earlier, at the completion of three years of the Taliban's de-facto government in Afghanistan, Deputy Minister of Justice, Abdul Karim Haidar, emphasised that drafting a constitution is not an "ordinary matter" and requires a decree from Amir al-Mu'minin, Mullah Haibatullah Akhundzada.² In response to UNAMA, the Taliban stated that "the decrees of the Islamic Emirate of Afghanistan Supreme Leader (May Allah protect him) form the basis of formal documents derived from Islamic sources," asserting that these decrees and legal texts are essential for societal reform and must be enforced.³

Even though Mullah Haibatullah Akhundzada holds a firm position as the leader of the Taliban, there are some incidents indicating emerging dissent in the group. As the group has been transforming itself from an insurgent force to a governing entity, it is witnessing some differences over the opinions concerning governance style. In February 2025, the Taliban's justice minister, Abul Hakim Haqqani, put up his resignation, alleging the group of corruption and systemic barriers. Even though his resignation has not been accepted, he is reported to be not attending the office and has left for Dubai. Similarly, the Taliban Deputy Foreign Minister, Abbas Stanakzai, has reportedly left for UAE after criticising the Supreme Leader openly.⁴

However, amid widespread speculations, the Taliban have denied any in-group tensions by reinforcing "obedience and respect" as significant principles of the group.⁵ Taking to the X (formerly Twitter), the Taliban spokesperson, Zabiullah Mujahid, wrote that it would be an "illusion" of the "enemies" to sow division among the members of the Taliban. He further noted that a few occasional differences among the group members "should never be mistaken for division."⁶

Currently, the Taliban appear to face no significant resistance to their rule within Afghanistan. However, in an interview in late 2024, Ahmad Massoud—the exiled leader of the National Resistance Front of Afghanistan (NRF)—claimed that since January 2024, his resistance group has conducted over 200 military operations across the country with the support of 5,000 fighters operating in 20 provinces. He argued that, in the long run, the

Taliban would lose their grip on Afghanistan due to their “lack of discipline, competence, legitimacy, and internal disunity.”⁷ In March 2025, the NRF also targeted various Taliban fighters in different provinces.⁸

The inclusion of minority and ethnic groups in Afghanistan’s interim government remains a key demand of both the international community and many Afghans. While the administration is predominantly male and Pashtun-led, the Taliban have incorporated nine cabinet members from non-Pashtun ethnic groups, including Uzbeks, Tajiks, and Hazaras. Additionally, they have retained over 500,000 officials from the previous Afghan administration in mid and lower-level public offices, including 513 former ministers, governors, and deputy governors.⁹

The Taliban continue to appoint and reshuffle individuals in leadership positions. At the national level, they have appointed two ministers, seven deputy ministers, one deputy national spokesperson, the governor and deputy governor of the Central Bank, and introduced 12 national directors across various ministries. Similarly, at the sub-national level, they have appointed four provincial governors, four provincial deputy governors, two provincial mayors, nearly 26 directors, and approximately 24 district governors.¹⁰

In the security sector, the Taliban have appointed five new provincial chiefs of police, one provincial deputy chief of police, five provincial chiefs of the General Directorate of Intelligence, one deputy chief of police for a provincial capital, and two district chiefs of police. Additionally, they have reshuffled four corps commanders.¹¹

In addition to this, the Taliban have been undertaking various measures to effectively manage governance matters. In this regard, The Ministry of Education held a press conference to announce the results of the examination for 8,165 vacant teaching positions and 5th and 6th grade administrative posts. During the announcement, the deputy minister for quality

assurance at the Ministry of Education, Abdul Khaliq Sadeq, said: “The recruitment process will address the overall and relative shortage of teachers in primary, secondary, and high schools. Inshallah, teachers will be hired according to their respective fields.” As per the Ministry’s officials, over 35,000 candidates appeared in the exams, with 11,463 able to successfully pass. Of these, 3,071 will be appointed, whereas the remaining 8,392 will be listed on the waiting list.¹²

Earlier, in March the Afghanistan National Standards Authority (ANSA) had announced the standardisation of 134 test methods - including 54 for the Higher Standards Council - by a technical committee. As per the ANSA, the development and effective implementation of such standards is important for sustainable development and quality assurance.¹³

During the same month, in a decree, Mullah Haibatullah Akhunzada, the Supreme Leader, ordered that all the mosques across the country must be exempted from paying electricity bills. The decree ordered the relevant organs to not ask for payments for electricity bills from mosques. However, to ensure that electricity in mosques is not being used for any other purposes, a monitoring system has been ordered, too.¹⁴

Likewise, to promote the use of Afghan currency for local transactions, the Taliban have banned the use of foreign currencies across the country. In Nangarhar province, for example, the local authorities have launched a campaign to prevent the use of Pakistani Rupee. In this regard, a joint commission, comprising different institutions, has been established that has instructed the locals to convert their accounts to Afghanis by the 30th Hamal of the Solar year 1404 (April 20, 2025) in a bid to avoid any actions by the authorities.¹⁵

Ongoing Infrastructure Projects

Since coming to power, the Taliban have been working to stimulate economic growth and improve Afghanistan's infrastructure through a combination of domestic initiatives and efforts to attract foreign investment.

In 2025, Afghanistan has been undertaking multiple small-to-large construction projects across the country. The most notable of such construction efforts are 32 development projects¹⁶ in Khost province and 111 development and construction projects¹⁷ in Logar province. Mayor of the Khost province, Qari Bismillah Bilal noted that nearly 5 million worth projects in his province would include completion of protective walls, roads and water canals in 12 months. Similarly, 111 development projects in Logar province would cost 19.8 million USD and has already created jobs for 1600 local residents.

In the health sector, the Taliban have been making efforts to build hospitals and seeking foreign assistance to deal with various diseases. In January 2025, the Bill and Melinda Gates Foundation announced the launch a programme titled: Polio Legacy Challenge, in Afghanistan with the aim of eradicating polio in the country. Similarly, to strengthen the country's health system, the Gates Foundation will contribute financial resources - along with Qatar, the UAE, and KSA - through the Afghanistan Reconstruction Trust Fund. It is to be noted that Afghanistan is one of the only two countries in the world with cases of polio. Similarly, though the Afghan Ministry of Public Health did not confirm a single case of polio in 2024, the World Health Organization (WHO) reported 25 cases across the country for the same year.¹⁸

In addition to this, the Afghan Taliban have been constructing various hospitals in different provinces of the country. One such hospital has been constructed in Nimroz province at the cost of 2 million USD, having capacity of 100 beds.¹⁹ Even though the hospital building has been completed, it is facing shortage of specialised doctors and quality medical services. Apart from this, in the Ghazni province, another 300-bed hospital is under construction with 90 per cent of its work completed. Earlier, the province's Public Health Department noted that it has utilised 313 million AFN (4.3 million USD) to provide basic health necessities, such as ambulance services, improved maternal and child healthcare services.²⁰ Similarly, to enhance the availability of such services across Afghanistan, the Afghan Minister of Public Health, Noor Jalal Jalali, announced that the Taliban aim to build standard hospitals in 318 districts of the country.²¹

As a land-locked country, Afghanistan has been making efforts to achieve water security by building dams and related infrastructure. In March 2025, the Afghan Ministry of Energy and Water announced the completion and subsequent operationalisation of three dams: Shah Aros, Omari, and Kamal Khan dams.²² The Shah Aros Dam has been built with a cost of 250 million USD, and has the capacity of irrigating 2,700 hectares of land and generating 1.2 megawatts of electricity. Similarly, the Omari Dam has been built with a cost of 127 million AFN (1.7 million USD), and has the capacity of irrigating 560 hectares of land and generating six kilowatts of electricity. The Kamal Khan Dam has the capacity of irrigating 170,000 hectares of

agricultural land and can generate 6 megawatts of electricity.²³

Apart from these, Matiullah Abid, spokesperson of the Ministry, noted that five additional such projects are being implemented and will be completed soon. He further noted that the Pashdan and Pelton Dams' construction has been progressed by 95 and 20 per cent, respectively. The Pashdan Dam, which will cost 117 million USD, can irrigate 13,000 jeribs (1 jerib = 0.2 hectares) of land and generate two megawatts of electricity. Likewise, the Pelton Dam holds the capacity of irrigating 2,500 hectares of land and generating 1 megawatt of electricity.²⁴ Moreover, to facilitate the diversion of water from different water sources, the spokesperson of the Ministry of Rural Rehabilitation and Development, Noorulhadi Adel, announced the completion of "construction of small dams and alternative projects in 142 districts" with a cost of 126 million AFN (1.7 million USD). The spokesperson further added that the Ministry has established 350 drinking water networks across all the provinces of the country, and work on additional 250 networks is under progress.²⁵

Moreover, the Taliban Ministry of Mines and Petroleum has announced the construction of Turkmenistan-Afghanistan-Pakistan-India (TAPI) gas pipeline. The Ministry's spokesperson, Homayoon Afghan, noted that the construction has progressed by 8 km and nearly 17.4 kilometres of the pipeline's route survey has been done. Moreover, 10.2 kilometres of pipe has been transported to the construction site. The TAPI gas pipeline is aimed at transporting gas from Turkmenistan to Pakistan and India, potentially resulting in the generation of 400 million USD of annual revenue for Afghanistan via transit charges. It needs to be noted that the TAPI gas pipeline is not an isolated project and rather involves various integrated projects too. These include: construction of a 500-kilovolt transmission line from Turkmenistan to transmit electricity via Afghanistan to Pakistan; a fiber optic cable installation; and a railway line parallel to the gas pipeline route.²⁶

The Afghan Taliban have also been trying to facilitate the return of tourism in Afghanistan by restoring various historical sites across the country. In this regard, the Helmand Directorate of Information and Culture has completed the protective boundary determination for 87 historical sites in the province in a bid to undermine land theft. Under the Afghan Ministry of Information and Culture, the Helmand Directorate will now construct protective walls around different historical places - an effort to ensure better preservation and keep historical structures intact. Currently, Helmand is home to 73 officially registered historical fortresses.²⁷ Overall, there are 9 historical monuments in Afghanistan listed with the United Nations Educational, Scientific and Cultural Organization (UNESCO).²⁸ Apart from this, the Ministry is also trying to register Baghe-Babur, Takht-e-Rustam, and the Masjid-e Noh Gunbad in Balkh with UNESCO.

Since coming into power, the Taliban Ministry of Information and Culture has renovated or restored over 40 historical monuments in 8 provinces of the country.²⁹ Similarly, work on the restoration of National Archives of Afghanistan - a monument having documents and artifacts of historical importance - has been completed by 40 per cent. The project, which involves the preservation and restoration of historical artifacts and renovation of infrastructure, will cost 4.6 million AFN (≈ 64,500 USD). The building of National Archives of Afghanistan was originally built by Shah Abdul Rahman Khan as a guesthouse for his son, Amir Habibullah Khan, over 130 years ago.³⁰

As a result of such efforts, Afghanistan is witnessing a surge of foreign tourists in the country. As per the Ministry of Information and Culture, in the current Solar year 1404, nearly 7,700 foreign tourists visited Afghanistan's historical sites, mainly in the provinces of Bamyan, Kandahar, Ghazni, Balkh, and Nuristan.³¹

Humanitarian Situation

As per the United Nations Children's Fund (UNICEF), almost 22.9 million people (nearly half of the population) in Afghanistan, including 12 million children, will be in need of humanitarian assistance in 2025.³² It noted that the humanitarian situation has become more severe due to factors like natural disasters and seasonal shocks. Due to the change in climate patterns, the country as a whole is experiencing a "widespread water crisis," causing the generation of food and health needs. In addition to this, 14.8 million people - over one-third of the total population - are facing acute food insecurity through March 2025.³³

It has been noted by UNICEF that the combined effects of extensive food and water insecurities have led to an increase in acute malnutrition cases among children as well as pregnant women. Given such severe circumstances, 7.8 million children under five years of age and women will be in need of nutrition assistance in 2025 - these include 3.5 million acute malnourished children and 1.1 million women.³⁴ Such dire circumstances can exacerbate in the face of mass deportation of undocumented Afghan refugees in neighboring countries, particularly Iran and Pakistan. In 2024, almost 1.2 million Afghan refugees returned back to Afghanistan from Iran and Pakistan. Similarly, given the announcements from Iran and Pakistan regarding the deportation of more Afghans by March 2025 will require more assistance at borders and other areas of return.³⁵

Given the dire humanitarian situation, UNICEF has been undertaking various efforts, with the support of its partners, in different sectors of Afghanistan. In the health sector, UNICEF

provided fundamental healthcare services at different levels across all the 34 provinces of the country, using 2,405 static health facilities. In addition to this, to support care for children and mothers, UNICEF further supported salaries of 27,778 healthcare staff - 10,655 females (38 per cent) and 17,123 males (61 per cent).³⁶

Moreover, to provide its nutrition services, UNICEF has established 3,300 service delivery points that are actively giving treatment to children - aged 0-59 months - suffering from severe wasting. Through its capacity-strengthening initiatives, UNICEF has provided counselling on maternal, infant, and young child nutrition (MIYCN) to 158,641 primary caregivers of children aged 0-23 months. In addition to this, regarding Integrated Management of Acute Malnutrition (IMAM), 155 healthcare workers were trained to develop their skills in nutrition care practices. Additionally, 938 community health workers (CHWs) received training on the community-based nutrition package (CBNP) while 29 partner staff and nutrition extenders were trained on supply chain management in the southern region.³⁷

Likewise, during January 2025, in the education sector, UNICEF extended assistance to 442,011 children (66 per cent girls) through 14,000 community-based education (CBE) classes across 32 provinces of the country. In addition to this, 7,025 children (64 per cent girls) were also beneficiaries of 255 early childhood education (ECE) classes in four provinces. During January, despite winter break in 28 out of 34 provinces' public schools, UNICEF developed a comprehensive supply distribution strategy for 2025 with aim of facilitating 2 million children.

Amid these efforts, the ban on girls' secondary education has posed a potential threat to female students' learning. In the face of such hurdles, UNICEF has provided teachers' training to 850 female students with aim to help them become advocates of transformation in society.³⁸

Earlier, in February 2025, U.S. President, Donald Trump, halted the country's 2.5 billion USD annual aid flow to Afghanistan. He stated that the resumption of aid is conditional to the return of U.S. military weapons left behind in Afghanistan.³⁹ However, the UN Secretary General, António Guterres, warned that the aid cuts will cause deprivation of health and other support services to over 9 million people in Afghanistan.⁴⁰

Human Rights and Women's Rights

Despite repeated warnings from the international community, the Taliban have not sufficiently addressed concerns about women's and human rights. Although they initially vowed to uphold women's rights in line with Islamic law and promote their education and participation in public life, they failed to take meaningful action to honour these commitments after assuming power.

Women

As per the report published by the Human Rights Watch (HRW), the human rights conditions worsened in Afghanistan during 2024 due to crack down by the Afghan Taliban. The report noted that Afghanistan was the only country in 2024, where females were barred from secondary and higher education. In addition to this, the females also faced the restrictions of basic rights, i.e. freedom of speech, assembly, and movement. Given this, UN's special rapporteur on the situation of human rights in Afghanistan, Richard Bennett, stated that in Afghanistan there is "an institutionalised system of discrimination, segregation, disrespect for human dignity, and exclusion of women and girls."⁴¹

In January 2025, representatives of different countries, including Germany, Austria, the Netherlands, and Canada urged the Afghan Taliban to remove restrictions on Afghan women. A statement issued by the German Foreign Ministry highlighted that the Taliban must adhere to its commitments under international law. Referring to the United Nations Convention on the Elimination of all Forms of Discrimination Against Women

(CEDAW), to which Afghanistan is also a signatory, the German foreign ministry told the Taliban to respect its provisions.⁴²

Responding to the allegations, Taliban's spokesperson for the Ministry of Vice and Virtue, Saif-ul-Islam Khyber, refuted the claims of the countries by terming those as "unfounded". While responding at the UN's side event on Afghan women, he noted that such claims are aimed at misleading public opinion. He further noted that since coming into power, the Taliban have been ensuring that "all women receive their Islamic rights as prescribed by Sharia law."⁴³ However, while speaking on a ceremony in Khost, Taliban's Deputy Foreign Minister, Abbas Stanikzai, criticised the leadership's decision of banning girls' education. He noted that closing the doors of educational institutions has little justification, and instead is an injustice to 10 million people of the country, i.e. women.⁴⁴

Nevertheless, Jan Egeland, head of the Norwegian Refugee Council (NRC) emphasised upon the need of engagement with the Afghan Taliban in a bid to restore girls and women's rights in Afghanistan, as "seminars in Western capitals will have little impact."⁴⁵

Apart from this, Taliban's spokesperson for the Ministry of Economy, Abdul Rahman Habib, underscored the role of Afghan women in the country's economy. He noted that as of March 2025, 26,000 women are working in the public sector, whereas 250,000 women are informally engaged in various economic activities in Afghanistan.⁴⁶ Moreover, on the occasion of International Women's Day, UNICEF showed its commitment towards empowering Afghan

women. It was announced that through its 18,000 learning classes, education of over 360,000 girls has been supported by the UNICEF.⁴⁷

Media

As per the Human Rights Watch (HRW) report, during 2024, the Taliban restricted media and freedom of expression, leading to detention and torture of journalists. The report noted that in September 2024, the Taliban banned the live broadcasting of domestic political programmes, criticism of the group, and allowed only limited interviews of individuals from a pre-decided list. Similar concerns were raised in a separate report by the United Nations Assistance Mission in Afghanistan (UNAMA), which noted that Taliban's interference in the internal activities of media outlets has significantly affected media freedom in Afghanistan. In this regard, women are subjected to more restrictions, resulting in more difficulty for them to access information as compared to males. Likewise, women are often less invited to attend the conferences arranged by the Taliban.

Owing to such restrictions, which also include prohibition of airing images of living beings, many outlets have suspended their programming activities. The challenges have been further exacerbated for journalists, as media outlets are facing loss of revenue in the absence of donor assistance since the Taliban came into power.⁴⁸ Similarly, on February 13, 2025, through their Ministry of Information and Culture, Taliban gave a verbal directive to media directives in Kabul that their organisations shall discuss issue of political and economic nature through the Taliban's spokesperson. Given this, the Committee to Protect Journalists called on the group to reverse its decision.⁴⁹

Economic Situation

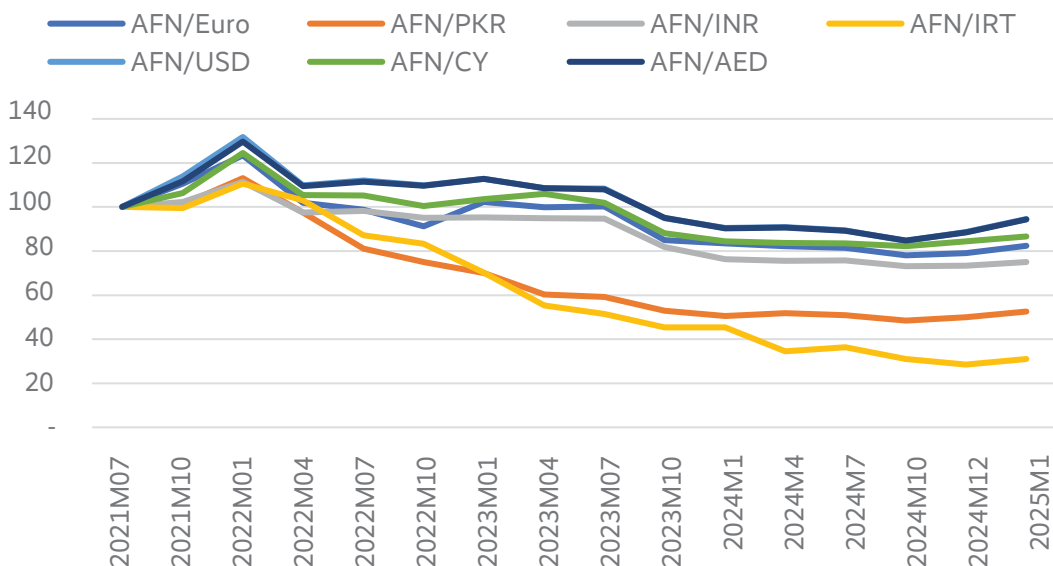
Since August 2021, the Taliban have prioritised economic issues, working to enhance revenue collection, stabilise the Afghani currency, and strengthen trade ties with neighbouring and regional countries. It has been noted by the World Bank that the country’s economic growth during 2023-24 shows a “positive development”.⁵⁰ Despite this, the growth remains insufficient, leading to rising poverty, unemployment rate, and poor purchasing power. Such an economic situation is mainly attributed to the country’s policy uncertainty, financial isolation, and insufficient human resources.

Afghani and Revenue Collection

As per the World Bank, the Afghan currency - the Afghani (AFN) - continued to depreciate for three consecutive months, i.e. November 2024 - January 2025, resulting in a total fall of 12 per cent. This is mainly because the Da Afghanistan Bank (DAB) halted the actions of the US dollar from September 4 to December 9, 2024.

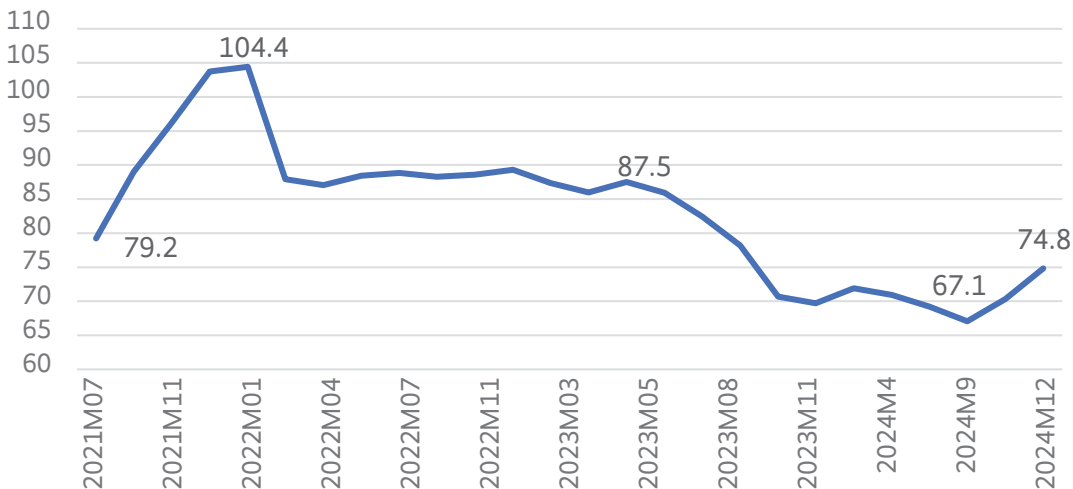
However, owing to a potential depreciation in January 2025, the actions were resumed, which led to the injection of more than 100 million USD in six interventions. On the contrary, the average exchange rate increased to 74.8 AFN per US Dollar in January 2025 as compared to 67.1 AFN in October 2024.⁵¹

Figure 1



Afghanistan Exchange Rate (July 2021 - January 2025) Higher = Depreciation
Source: World Bank⁵²

Figure 2

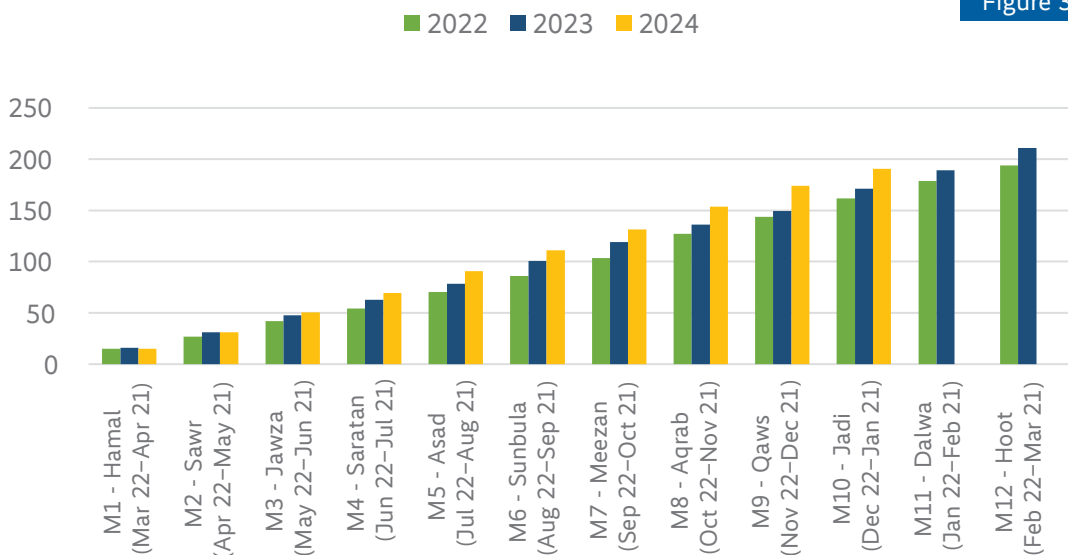


Average Monthly AFN/USD Exchange Rate
Source: World Bank⁵³

Moreover, the revenue collection of Afghanistan increased by 11.5 per cent on year-on-year basis, thus crossing the 10-month target by 2 per cent. During the first ten months of Afghan fiscal year (March 22, 2024 – January 21, 2025), the country’s revenue collection reached 190.5 billion AFN (2.5 billion USD), i.e. 12 per cent of the country’s GDP. As per the World Bank, the

domestic tax collection increased by 11 per cent, reaching 72.1 billion AFN, which increased the overall revenue growth by 2.8 percentage points. Similarly, non-tax revenue surged by 22 per cent, reaching 66 billion AFN. Such exponential growth is mainly due to higher income from mining, tolls, registration of vehicles, etc.⁵⁴

Figure 3



Afghanistan’s Total Revenue (billion USD) (March 22 - January 21, 2024-25)
Source: World Bank⁵⁵

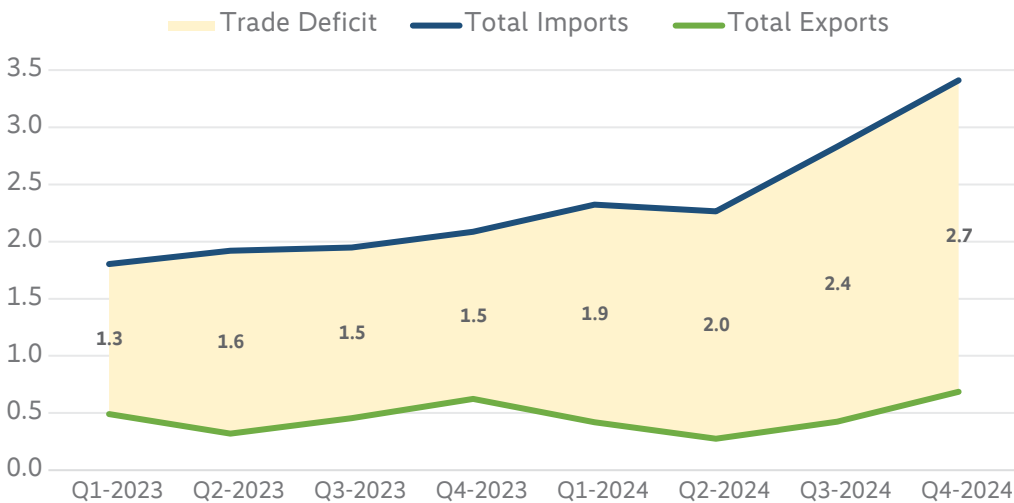
Similarly, custom duties and fees contributed 4.5 per centage points to total revenue growth, as such fees increased 20 per cent on year-on-year (Y-o-Y) basis, reaching 51.5 billion AFN. Such an increase was mainly due to surges in imports, better border management, and tariff adjustments.

Trade

According to the World Bank, in December 2024, Afghanistan's trade deficit increased by 8 per

cent month-on-month (M-o-M) basis, reaching 926 million USD, making the total trade deficit increase from 5.9 billion USD (34 per cent of total GDP) in 2023 to 9 billion USD (45 per cent of GDP) in 2024. In 2024 only, the overall trade deficit witnessed a surge of 54 per cent. Such an exponential surge is attributed to stronger Afghan currency (AFN), inflows of unidentified foreign currencies in Afghanistan, periodic border closure with Pakistan, etc.⁵⁶

Figure 4



Afghanistan Trade Deficit (billion USD)

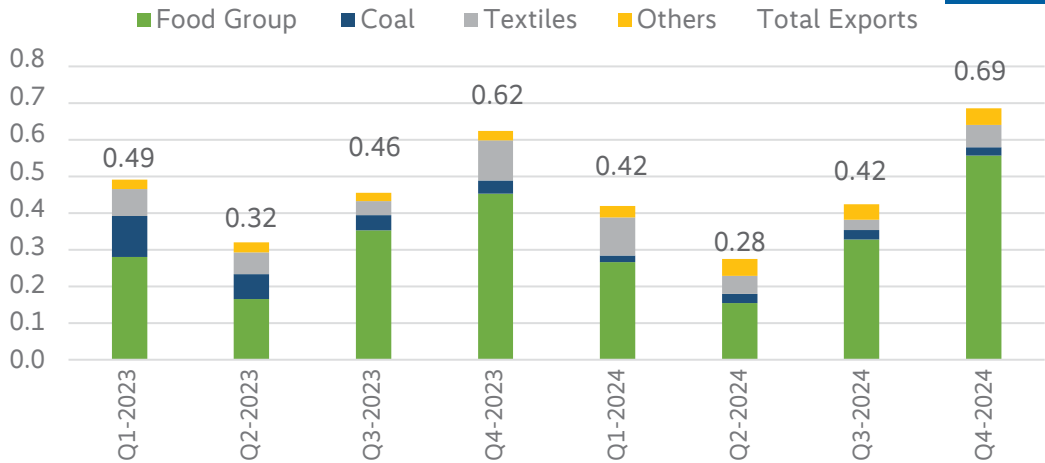
Source: World Bank⁵⁷

In December 2024, Afghanistan's exports decreased by 19.5 per cent on M-o-M basis, reaching 191 million USD. Such a sharp decline is mainly due to a 25 and 23 per cent drop in food and textile exports - both affected due to unfavourable weather conditions - respectively. Nevertheless, the annual food exports increased 4 per cent, reaching 1.3 billion USD in 2024, due to Chinese tariff exemptions and improved trade ties with Pakistan. However, coal exports contracted significantly, i.e. declining 64 per cent to 92 million USD, owing to Pakistan's shift to its traditional suppliers. Overall, a decline in coal and textile exports led to a 5 per cent drop in total exports, reaching 1.8 billion USD in 2024. Despite fragile trade relations between

Afghanistan and Pakistan, the latter remained the largest export destination for Afghan products accounting to 45 per cent of the total Afghan exports. This is followed by India (34 per cent), Iran (3 per cent), Kazakhstan (3 per cent), and Uzbekistan (3 per cent).⁵⁸

In December 2024, Afghanistan witnessed an increase in its imports, reaching 1.12 billion USD as compared to 1.1 billion USD in November 2024. An increase in imports is mainly attributed to imports of food products that make up 20 per cent of the total imports. In addition to food products, chemical and mineral products also experienced surge in imports.

Figure 5

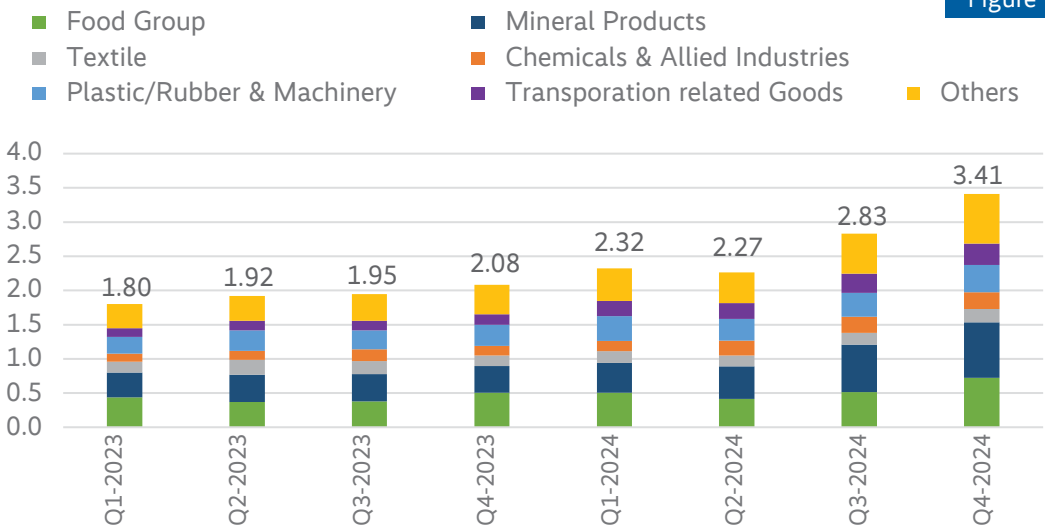


Afghanistan Exports (billion USD)
Source: World Bank⁵⁹

During 2024, the overall imports reached 10.8 billion USD, showing a significant increase of 40 per cent as compared to 2023. On Y-o-Y basis, transportation equipment witnessed the highest import growth - an increase of 86 per cent. This is followed by minerals (56 per cent), chemical products (51 per cent) machinery and equipment (41 per cent), and food (28 per cent). In value terms, in 2024, minerals and food account for the largest import categories, i.e. totaling 2.4 billion USD and 2.2 billion USD, respectively, or

making up 42 per cent of the overall imports. On the contrary, textile imports decreased by 3 per cent, reaching 700 million USD. For Afghanistan's imports, Iran served as the largest import partner in 2024, as it made up 30 per cent of total imports with an 84 per cent annual increase, despite a slight decrease in December. In addition to Iran, the UAE (19 per cent), Pakistan (16 per cent), and China (7 per cent) served as the major import partners.⁶⁰

Figure 6



Afghanistan Imports (billion USD)
Source: World Bank⁶¹

Poppy cultivation

Shortly after taking power, the Taliban banned opium cultivation across the country's agricultural fields, resulting in a 95 per cent reduction in opium production by April 2022.⁶² Despite this, as per the United Nations Office on Drugs and Crime (UNODC), the 2022 opiate stocks of 13,200 tonnes are enough to fulfill the demand by 2027. As noted by the UNODC's executive director, Ghada Waly, the "surge in opium prices and the substantial stockpiles mean that drug trafficking in Afghanistan remains a highly profitable illicit trade." She further noted that the gained profits are being used for funding transnational organised criminal groups as well as for the destabilization of Afghanistan in particular and the region at large.⁶³

In 2024, the price for per kilogram of opiate has reached 750 USD as compared to 75 USD for the same weight in 2022, when the Taliban imposed ban on opium cultivation. Furthermore, the incidence of opium seizures has been declining since the latter half of 2023. Earlier, the cases of opium seizures increased by 50 per cent soon after the announcement of ban by the Taliban in 2022. This decrease in opium seizures is mainly due to less production of opium in Afghanistan, subsequently causing lesser smuggling outside the country.⁶⁴

Foreign Situation

Since taking control of Kabul, the Taliban have actively engaged with neighbouring countries and the broader international community through various channels. Despite lacking official recognition, they consider themselves equal participants in global affairs. Their interactions include meetings with foreign diplomats in Afghanistan, hosting international delegations, travelling abroad, and participating in regional and global forums.

In a bid to enjoy relations with all the countries, the Taliban's Foreign Minister, Amir Khan Muttaqi, stated: "Balanced policy means that we do not fight one country to please another, and we do not oppose one country for the satisfaction of another. We seek normal relations with all countries."⁶⁵ Given this, currently, there are over 40 active missions of Afghanistan across the world. Similarly, there are nearly 20 missions of different countries that are active in Afghanistan.⁶⁶

More recently, as part of enhancing their relations with other countries, the Taliban announced a list of proposed diplomats to be appointed in India. Among the suggested individuals is the name of Najib Shaheen, son of Sohail Shaheen, Taliban's representative in Qatar. Speaking to the media, Taliban's spokesperson, Zabiullah Mujahid stated: "Efforts are being made to ensure India's diplomatic presence in Afghanistan and Afghanistan's diplomatic presence in India," owing to "favourable" conditions. Earlier, in November 2024, the Taliban had announced the appointment of Ikramuddin Kamil as the acting consul general of Afghanistan in India.⁶⁷

On March 22, 2024, Pakistan's Special Representative for Afghanistan, Mohammad Sadiq Khan, led a high-level delegation to Kabul, where they met Afghan Foreign Minister, Amir Muttaqi, and discussed issues of bilateral importance, ranging from trade to people-to-people relations.⁶⁸ In addition to this, from March 24, 2025, the Afghan Embassy in Norway has resumed the provision of counsellor services.⁶⁹

Similarly, as a gesture of goodwill, the Taliban released an American national - George Glezmann - in March 2025 - a development facilitated by the UAE and Qatar.⁷⁰ George Glezmann, a Delta Airlines mechanic in Atlanta, was visiting Kabul as a tourist in 2022 when he was detained. Likewise, in another notable development, the US lifted a 10 million USD reward for anyone offering information leading to the arrest of Sirajuddin Haqqani, the Taliban's leader. The US Federal Bureau of Investigation (FBI) had listed the reward on his information as he was "believed to have coordinated and participated in cross-border attacks against United States and coalition forces in Afghanistan."⁷¹

As part of their engagement efforts, the Taliban have been hosting various delegations. In January 2025, Iranian Foreign Minister, Abbas Araghchi paid a visit to Afghanistan, during which he met with Taliban's Foreign Minister, the Prime Minister, and the Defense Minister. The visit was significant in the relations between the two countries, as it was the first by an Iranian Foreign Minister to Afghanistan since August 2021, who described it as "the beginning of a new path and a new chapter in bilateral relations."⁷²

Apart from these, the Taliban have been leading delegations to different countries. Most notable among such visits is the group's delegation's visit to Japan in February 2025. Consisting of health, education, economy and foreign affairs officials, the delegation paid a week-long visit as an effort to showcase itself as an "active member of the international community." It is to be noted that in August 2021, Japan had temporarily moved its embassy in Afghanistan to Qatar. However, Japan has since resumed its diplomatic activities and humanitarian efforts in the country.⁷³

In February 2025, Mullah Abdul Ghani Baradar, Deputy Foreign Minister for Economic Affairs, led a high-level delegation to Uzbekistan. During the meeting, the two sides discussed issues related to trade, economy, aviation, agriculture, and railways. It was also agreed upon during the visit to reduce the cost of 500-kilovolt transmission line from 252 million USD to 222 million USD.⁷⁴

Security Situation

As per the United Nations Assistance Mission in Afghanistan (UNAMA), between November 1, 2024 to January 31, 2025, it recorded 2,081 security-related incidents, showing a 16.8 per cent decrease as compared with the same period in 2023/2024. For the same period, the United Nations, however, noted 91 confirmed attacks from the armed opposition groups - 53 by the National Resistance Front (NRF), 21 by the Afghanistan Freedom Front, 1 by People's Sovereignty Front, and the remaining 16 by unverified entities.⁷⁵

Apart from such opposing groups, from November 1, 2024 to January 31, 2025, ISKP was reportedly involved in six attacks that targeted religious minorities, Taliban officials and institutions in Afghanistan. Similarly, on January 21, 2025, ISKP killed one Chinese citizen and one member of the security forces in the Khwaja Baha ud Din district of Takhar province.⁷⁶

Given these, UN's officials on counterterrorism warned during a UNSC meeting about the level of threat posed by ISKP. They highlighted the ISKP as one of the "most dangerous branches"⁷⁷ of transnational terrorist groups. It was noted that ISKP has been regularly recruiting individuals from the Central Asian states.

In light of these, the UN's Undersecretary for Counterterrorism, Vladimir Voronkov appealed member states to prevent Afghanistan from "again becoming a hotbed of terrorist activities." Similarly, Chinese envoy, Fu Cong, noted that terrorists related to ISKP, Al-Qaida, and the East Turkestan Islamic Movement (ETIM) "are very active" in Afghanistan and "are colluding with each other."

Opinion Corner

Afghanistan: A Landlocked or Land-Link Country? Opportunities for Collaboration with Pakistan under the new “APTTA”

By Muzammil Shinwari

Afghanistan, often labelled as a landlocked country due to its lack of direct access to the sea, possesses the unique potential to transform into a land-link country. Geographically positioned as a bridge between Central Asia and South Asia, Afghanistan holds immense strategic importance for trade, connectivity, and economic integration in the broader region. However, realising its potential as a land-link country requires political stability, robust infrastructure, and cooperative relations with its neighbours—particularly Pakistan.

The renegotiated Afghanistan-Pakistan Transit Trade Agreement (APTTA) is a key framework that can redefine Afghanistan’s role in regional trade. Strengthening this agreement offers a win-win scenario for both countries, enabling Afghanistan to move closer to becoming a transit hub while advancing Pakistan’s ambitions of becoming a gateway to Central Asia.

Afghanistan’s Geographical Importance: From Landlocked to Land-Link

Afghanistan’s central location connects resource-rich Central Asia with the dynamic markets of South Asia. Bordering six countries—including China, Iran, Pakistan, and several Central Asian republics—it has the potential to serve as a vital corridor for trade, energy, and transportation.

This vision of Afghanistan as a “land-link” country hinges on leveraging its transit routes for regional connectivity. Projects like the Turkmenistan-Afghanistan-Pakistan-India (TAPI) gas pipeline, CASA-1000 electricity project, and the Chabahar Corridor underscore its importance. However, Afghanistan’s economic reliance on transit trade and its dependence on neighbouring countries’ infrastructure make agreements like APTTA critical for its transformation.

APTTA: An Opportunity for Regional Trade

Signed in 2010, the Afghanistan-Pakistan Transit Trade Agreement (APTTA) provides Afghanistan access to Pakistani seaports—primarily Karachi and Gwadar—for its imports and exports. In return, Afghan territory serves as a transit route for Pakistani exports to Central Asia. The agreement is a cornerstone of bilateral economic cooperation and has the potential – if renegotiated - to transform Afghanistan into a land-link state.

Key Benefits of APTTA

1. Access to Global Markets: APTTA grants Afghanistan access to Pakistani seaports, connecting its economy to global markets. This access helps Afghanistan overcome its geographical limitations, reducing the cost of trade.
2. Central Asia-South Asia Linkage: Pakistan benefits from APTTA by using Afghanistan as a route for its goods heading to Central Asia. This facilitates trade with landlocked nations like Uzbekistan and Turkmenistan, unlocking untapped economic potential.

3. **Facilitating Regional Integration:** APTTA aligns with larger regional initiatives, such as the Belt and Road Initiative (BRI), the development of the China-Pakistan Economic Corridor (CPEC), and Pakistan's desire for greater access to Central Asia.

Challenges in APTTA's Implementation

While the framework of APTTA is promising, its implementation has faced several challenges:

1. **Bilateral Tensions:** Political mistrust and border disputes between Afghanistan and Pakistan often hinder the smooth implementation of APTTA. Accusations of trade restrictions, smuggling, and inefficiencies at border crossings like Torkham and Chaman have created bottlenecks.
2. **Inadequate Infrastructure:** The lack of modern transport infrastructure in Afghanistan, including roads, railways, and border facilities, limits its capacity to serve as a reliable transit corridor.
3. **Geopolitical Rivalries:** Regional rivalries, particularly the influence of India and Iran, pose challenges. For example, India has sought to bypass Pakistan through the Chabahar Port in Iran, reducing its reliance on APTTA.

The Way Forward: Strengthening Afghanistan-Pakistan Collaboration

To transform Afghanistan from a landlocked to a land-link nation, both countries must work together to address the challenges and maximize the benefits of APTTA. Key steps include:

1. **Expanding APTTA's Scope:** The agreement should be revised to include additional transit routes and countries, such as Uzbekistan, Tajikistan, and Turkmenistan, making it a regional framework rather than a bilateral one.
2. **Modernizing Border Infrastructure:** Investments in border crossings, digital customs systems, and transport corridors are essential to reduce

delays and enhance trade efficiency. The development of railways connecting Pakistan to Afghanistan, such as the proposed Peshawar-Kabul railway, would be a game changer.

3. **Ensuring Security:** A stable and internationally recognized Afghan government is essential for the successful implementation of APTTA. Both nations must prioritize ensuring that political considerations do not disrupt transit trade or impede transit routes.
4. **Leveraging Gwadar and CPEC:** Pakistan's Gwadar Port and its connectivity through the China-Pakistan Economic Corridor (CPEC) can play an important role in linking Afghanistan to international markets. APTTA should align with CPEC projects to create seamless connectivity.
5. **Building Trust:** Confidence-building measures, such as joint trade exhibitions, easing visa restrictions for traders, and creating dispute resolution mechanisms, can foster trust between the two countries.

A Shared Vision for Regional Prosperity

The future of Afghanistan lies not in being viewed as a landlocked nation but as a land-link hub for regional trade and connectivity. APTTA offers a crucial mechanism to achieve this vision by integrating Afghanistan into regional economic networks and unlocking its geographical potential. For Pakistan, a stable and economically integrated Afghanistan is vital for its own security and economic ambitions.

By addressing existing challenges and strengthening APTTA, Afghanistan and Pakistan can work together to foster regional integration, unlock trade opportunities, and transform the region into a hub of prosperity. For Afghanistan, the journey from being landlocked to becoming a land-link nation is not just a possibility—it is a necessity.

Muzammil Shinwari is former deputy of the international trade department at the Ministry of Commerce and Industry security agencies can contribute to regional security.

Iran's Policy towards Afghanistan

By Foad Izadi

Iran has long had a complicated relationship with the Taliban. During the Taliban's rule of Afghanistan from 1996 to 2001, Iran opposed the group and provided support to their opponents. However, during the American occupation of Afghanistan, Iran provided support to the Taliban as a means of countering the influence of the United States.

In response to the Taliban's takeover of Kabul, Iran has adopted a flexible policy toward the group, the core elements of which are non-confrontation, pragmatism, necessary cooperation and opposition to rapid recognition.

Iran's policy of non-confrontation stems from its desire to maintain stability in the region and avoid any potential conflict with the Taliban. This approach is also driven by Iran's concerns about the potential for increased instability and security threats in Afghanistan, including the spread of extremist ideologies and increased drug trafficking.

The pragmatic approach of Iran towards the Taliban is based on the recognition that they are now the most significant political force in Afghanistan and must be engaged with. This policy of pragmatic approach resulted in Iran officially handing over the Afghan embassy in Tehran to diplomats from the Taliban on February 26, 2023.

At the same time, Iran has made it clear that any cooperation with the Taliban must be based on mutual respect and shared interests. Iran has opposed the rapid recognition of the Taliban as the legitimate government of Afghanistan, preferring instead to wait and see how the situation develops before making any formal declarations of recognition. Overall, Iran's response to the Taliban's comeback in Afghanistan has been a combination of diplomatic efforts, security measures, and humanitarian aid.

Iran has historically maintained a significant influence in Afghanistan due to their shared border and cultural ties, as well as political and economic interests. Here are some of the ways Iran's influence has manifested in Afghanistan:

Ethnic and linguistic ties: Afghanistan has a significant population of ethnic Hazaras, who share cultural and linguistic ties with Iran's majority Shia population. Iran has provided support to Hazara's political and religious groups in Afghanistan, which has helped to cement their influence in the country.

Political support: Iran has supported various Afghan political factions over the years, including the Northern Alliance during the Afghan civil war in the 1990s and the Taliban during their insurgency against US-led coalition forces.

Economic ties: Iran is one of Afghanistan's largest trading partners, with bilateral trade estimated to be worth over 2 billion USD annually. Iran has also invested in infrastructure projects in Afghanistan, such as building roads and power plants. Iran has become the top exporter to Afghanistan for several reasons:

Proximity: Iran shares a long border with Afghanistan, making it a natural trading partner for the landlocked country.

Cultural and linguistic ties: Iran and Afghanistan share many cultural and linguistic ties, which can make it easier for Iranian businesses to navigate the Afghan market.

Afghan demand: Afghanistan is a developing country with a growing population and economy, and there is a high demand for goods and services. Iran has been able to capitalise on this demand by providing affordable and high-quality goods.

Afghan Refugees in Iran

Iran has been hosting Afghan refugees for more than four decades, and it is estimated that there are currently around 2.5 million Afghan refugees

and migrants living in Iran. Iran's policy towards Afghan refugees has evolved over time and it has been shaped by various factors, including political, economic, and social considerations.

Initially, Iran's policy towards Afghan refugees was largely based on humanitarian grounds. Following the Soviet invasion of Afghanistan in 1979, Iran opened its borders to Afghan refugees, and provided them with shelter, food, and other basic needs. The Iranian government also established refugee camps along the border, where refugees could stay temporarily.

However, over time, the situation changed. The number of Afghan refugees increased significantly, and the government of Iran began to view them as a challenge. The Iranian government has also been concerned about the security implications of hosting such a large number of refugees, particularly given the ongoing conflict in Afghanistan.

As a result, Iran has adopted a more restrictive policy towards Afghan refugees in recent years. For example, the Iranian government has implemented stricter border controls, and has taken measures to limit the entry of Afghan refugees into the country. Iranian authorities have also started deporting Afghan refugees who are living in the country illegally, or who have committed crimes.

Overall, while Iran has provided a safe haven for millions of Afghan refugees over the years, its policy towards them has become more restrictive in recent years, reflecting the changing political and security situation in the region.

Iran-Afghanistan Water Disputes

The Iran-Afghanistan border has been the subject of various water-related disputes over the years. Here is a brief overview of some notable instances:

1. Helmand River Dispute: The Helmand River, which flows from Afghanistan into Iran, has been a significant source of contention. In the 1960s, Afghanistan constructed the Helmand River Valley Project, including the Kajaki Dam and irrigation canals, to support its agricultural development. This led to disagreements between Iran and Afghanistan over water sharing and the downstream impacts on Iran's water supply.
2. Hirmand River Dispute: The Hirmand River, also known as the Harirod River, forms a portion of the Iran-Afghanistan border. Disputes have arisen regarding water allocation and management, particularly during times of drought. Both countries have expressed concerns over water scarcity and its impact on agriculture and livelihoods in border regions.
3. Zaranj-Delaram Water Dispute: The Zaranj-Delaram River, another border river, has been a source of tension between Iran and Afghanistan. The river has faced issues related to water diversion and unauthorised construction of dams and irrigation channels on the Afghan side, affecting water availability in Iranian regions near the border.
4. Lake Hamun: Lake Hamun, located on the Iran-Afghanistan border, has been a subject of disputes related to water levels and environmental degradation. Drought conditions, as well as upstream water diversions and irrigation projects in Afghanistan, have contributed to the shrinking of the lake and its negative ecological impact.

These disputes have often involved negotiations, diplomatic efforts, and occasional tensions between Iran and Afghanistan. Efforts have been made to address the conflicts through bilateral talks, mediation by international organisations, and the establishment of joint committees to discuss water-related issues.

Iran hopes cooperation with the Taliban will help to resolve these historical disputes through some of the following initiatives:

1. Water Sharing Agreements: Iran and Afghanistan can work towards developing formal

agreements or protocols for sharing water resources along their border. This could involve establishing mechanisms for equitable sharing of rivers, streams, or other water bodies that cross the border. Negotiations and consultations between the two countries' water authorities can help establish mutually beneficial arrangements.

2. **Joint Water Management:** Iran and Afghanistan can collaborate on joint water management initiatives along their border. This could involve setting up joint committees or technical working groups to monitor water quality, study hydrological patterns, and coordinate water management efforts. Sharing data, conducting joint studies, and implementing joint projects can contribute to effective and sustainable management of shared water resources.
3. **Infrastructure Development:** Iran and Afghanistan can jointly invest in infrastructure projects aimed at enhancing water management along their border. This could include the construction of dams, reservoirs, irrigation canals, or water treatment facilities. Such infrastructure development can help regulate water flow, improve irrigation systems, and support agricultural activities in border regions.
4. **Information and Data Sharing:** Timely and accurate information sharing is essential for effective water resource management. Iran and Afghanistan can cooperate in exchanging hydrological data, sharing research findings, and providing technical expertise on water-related issues. This can enable both countries to make informed decisions and take appropriate measures for sustainable water use.
5. **Capacity Building:** Iran can support Afghanistan in building its capacity for water resource management. This can involve providing training programs, technical assistance, and knowledge sharing on topics such as water governance, irrigation techniques, and water conservation practices. Building the capacity of Afghan institutions and personnel can contribute to sustainable water management along the border.

6. **Conflict Resolution Mechanisms:** In situations where disputes or conflicts arise over water resources along the border, Iran and Afghanistan can establish mechanisms for peaceful resolution. This can involve utilising existing international legal frameworks, engaging in diplomatic negotiations, or seeking mediation from neutral parties to address any disagreements that may arise.

It's important to recognise that effective cooperation on border water resources requires political will, mutual trust, and ongoing dialogue between the two countries. The specifics of cooperation would depend on the specific context, priorities, and needs of both Iran and Afghanistan, as well as the availability of resources and technical expertise.

Iran-Pakistan Cooperation on Afghanistan

Iran and Pakistan have shared interests and concerns regarding the situation in Afghanistan. While their relationship has had its ups and downs, there are several areas where they can potentially cooperate to promote stability in Afghanistan. Here are some ways Iran and Pakistan could collaborate:

1. **Regional Dialogue:** Iran and Pakistan can engage in regional dialogue and coordination to address the challenges in Afghanistan. They can participate in multilateral forums such as the Shanghai Cooperation Organization (SCO) to discuss and coordinate their approaches to promoting peace and stability in Afghanistan.
2. **Border Management:** Iran and Pakistan can collaborate on border management to curb illegal activities, including drug trafficking and smuggling. Strengthening border security and increasing intelligence sharing can help control the flow of illicit goods and prevent the movement of extremist elements.
3. **Refugee Management:** Both Iran and Pakistan have experienced significant refugee flows from Afghanistan. They can cooperate

on managing and supporting Afghan refugees, ensuring their well-being, and providing necessary humanitarian assistance. Sharing best practices and coordinating efforts can alleviate the burden on both countries.

4. Counterterrorism Cooperation: Iran and Pakistan can enhance their cooperation in combating terrorism and extremism in Afghanistan. They can share intelligence, coordinate efforts to dismantle terrorist networks, and prevent the cross-border movement of militants. Joint military exercises, intelligence sharing, and cooperation among security agencies can contribute to regional security.
5. Economic Development: Iran and Pakistan can collaborate on economic development initiatives in Afghanistan. Joint investments in infrastructure projects, energy cooperation, and trade facilitation can contribute to stability and economic growth in Afghanistan. The Chabahar port in Iran and the Gwadar port in Pakistan could potentially serve as important trade routes for Afghan goods.
6. Diplomatic Efforts: Iran and Pakistan can work together diplomatically to support an inclusive political settlement in Afghanistan. They can encourage dialogue between the Afghan government and different factions, promote peace negotiations, and support the reconciliation process. Both countries can use their diplomatic channels to engage with regional and international stakeholders for a comprehensive resolution of the Afghan conflict.

Given the fact that both Iran and Pakistan have good relations with China, the three countries can also potentially cooperate on various fronts when it comes to Afghanistan. Here are some ways they could collaborate:

1. Economic Development: All three countries can collaborate on economic development projects in Afghanistan. China's Belt and Road Initiative (BRI) can serve as a framework for infrastructure development, connectivity, and trade promotion. Iran and Pakistan

can also contribute by exploring joint investment opportunities, supporting Afghan industries, and facilitating trade and transit routes.

2. Security Cooperation: Given the security challenges in Afghanistan, Iran, Pakistan, and China can enhance their cooperation on counterterrorism and border security. They can share intelligence, coordinate efforts to combat extremist groups, and prevent the cross-border movement of terrorist groups like ISIS. Joint military exercises, intelligence sharing, and training programs can strengthen security cooperation.
3. Humanitarian Assistance and Reconstruction: Iran, Pakistan, and China can jointly support humanitarian assistance and reconstruction efforts in Afghanistan. They can coordinate their aid programs, contribute to rebuilding infrastructure, provide healthcare services, and support education and capacity-building initiatives to help rebuild the Afghan society.
4. Diplomatic Efforts: The three countries can align their diplomatic efforts to support an inclusive political settlement in Afghanistan. They can collectively encourage dialogue between the Afghan government and different factions, promote peace negotiations, and support the reconciliation process. Their combined diplomatic influence can contribute to creating an environment conducive to peace and stability.

It is worth noting that cooperation among Iran, Pakistan, and China in Afghanistan is subject to various factors, including their individual relations with Afghanistan, regional dynamics, and the evolving situation in the country. Successful cooperation would require ongoing dialogue, mutual trust, and a shared commitment to supporting Afghanistan's stability and development.

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Afghanistan Monitor

Volume 10

The 10th edition of the Afghanistan Monitor analyses key developments from Jan–Mar 2025 under Taliban rule. Despite consolidating control, the Taliban face challenges in governance, human rights, and internal cohesion. Economic gains, such as improved revenue collection, are offset by depreciation of the Afghani and reduced aid. Ongoing restrictions on women's rights hinder international recognition. While seeking global legitimacy and engagement, the Taliban struggle with inclusivity and minority representation, raising concerns about long-term stability.

Further information on this topic can be found here:

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