



**Risk Mitigation Consulting Inc.**

*Intelligence and Analysis Division*

## WHITE PAPER SERIES

Afghanistan Situation Update: Geopolitical Developments

November 2021

### **INTENT**

This white paper is designed to provide analysis of relevant, publicly available information on threat and hazard events/trends and their potential impacts to the interests of the United States, both at home and abroad. This product is not intended to be an all-encompassing assessment of the subject.



## Afghanistan Situation Update: Geopolitical Developments

### Introduction

The recent U.S. withdrawal of military forces from Afghanistan and subsequent Taliban takeover of the country has created an environment in which a number of foreign nation-states may seek to exploit geopolitical opportunities. The current environment in Afghanistan provides a number of opportunities for U.S. adversaries such as China, Russia, and Iran to exploit, particularly with regards to military, economic, and diplomatic relationships. In turn, these countries may be concerned with a number of potential security issues stemming from the Taliban takeover.

This paper does not seek to make predictive judgments about the state of the overall geopolitical environment in Afghanistan in the coming months and years. Rather, it seeks to examine the three of the major U.S. adversaries involved, as well as their various interests/objectives, as well as recent developments related to these interests/objectives. The information included is current as of 5 November 2021.

### China

The changing environment in Afghanistan is of great interest to China. China and Afghanistan share a 57-mile-long border. Both threats and opportunities have developed in mainly the economic and security fields. In June of this year, China released an 8-point plan in light of the changes taking place in the country. The language originally discussed an “inclusive” process of "Afghan-led, Afghan-owned" reconciliation, but after the rapid Taliban takeover, China quickly announced its support for the “choice of the people” of Afghanistan. This highlights China’s hopes for a positive and close relationship between the two countries moving forward.<sup>1</sup>

The presence of U.S. forces in Afghanistan provided China with free regional security. However, the county must now face a new environment and decide how hands-on the China-Afghanistan relationship will be. China’s security concerns include the potential harboring of militant Uyghur groups. Members of the Muslim minority have sought refuge in Afghanistan. Some have been linked to al-Qaeda. China will seek to prevent Afghanistan from becoming a base from which dissent and attacks may emanate from. When the Taliban was in control of Afghanistan in the 1990s, the Chinese government offered political recognition and investments if assured that opposition separatists groups would not be harbored.<sup>1,2</sup> A similar agreement may arise in this situation. However, some experts have said this fear is overblown and the larger threat is from other non-Uyghur jihadist groups.<sup>3</sup> Recent developments have put the Taliban and the terror group known as Islamic State Khorasan (ISK) on opposing ends of this issue. ISK appears to be opposing the Taliban’s deportation of Uyghurs as a means of recruitment.<sup>4</sup>

Economically, China has numerous current investments in Afghanistan, with plans to expand. Afghanistan contains deposits of rare earths and other essential minerals for manufacturing. In 2010, US military experts and geologists estimated that there was nearly \$1 trillion present in



mineral wealth in the country. A follow-up report by the Afghan government in 2017 estimated that Kabul's new mineral wealth may be as high as \$3 trillion, including fossil fuels. China's massive manufacturing sector is in constant need of minerals. China is already the largest foreign investor in Afghanistan and is very likely to seek partnerships in this sector.<sup>5</sup> The development of a mining industry in the country is still in the beginning stages, and any benefits will likely take years to see.<sup>6</sup>

China's Belt and Road Initiative (BRI) is an enormous infrastructure plan aiming to build road, rail, and sea routes through Asia to Europe. Afghanistan has been an official partner of BRI since May 2016.<sup>5</sup> A positive relationship with neighboring Afghanistan is important in continued development of this plan. Though BRI infrastructure could expand around Afghanistan, it is impractical. The country's location on the Chinese border is not only a valuable opportunity for growth, but could also present a vulnerable weak spot, threatening the economic corridor. A stable country that welcomes such infrastructure would be ideal for China.<sup>3</sup>

Any internal violence or instability within the country may interfere with Chinese investments. For example, two Chinese corporations won a 30-year lease for a large copper mine in Afghanistan in 2008 and have yet to start extracting the mineral, due to regional instability. Additionally, investments China has made in Pakistan, to include a major international port, could be threatened by opposition forces in Afghanistan.<sup>1</sup> For this reason, China will encourage peace in the country, though the amount of direct action the country is willing to take remains to be seen.

Finally, concerns regarding the potential reverse engineering of old U.S. equipment have arisen. Utilizing U.S. systems left in the country, the collection of intelligence information presents possible security concerns should the Chinese-Afghanistan relationship grow in the future. However, the types of equipment left, and the information stored, is unknown, and may not contain intelligence that would benefit China or threaten the U.S..<sup>7</sup>

## Russia

The U.S. withdrawal from Afghanistan and its aftermath have been predominately a public relations victory for Russia. The Kremlin has celebrated the ordeal and also struck a conciliatory tone with the Taliban. Open source reporting suggests that Russia is attempting to maintain a more complicated balancing act of foreign policy in the region. Ambassador Dmitry Zhirnov met a representative of the Taliban within 48 hours of the group's takeover in mid-August.<sup>8</sup> Moscow has publicly predicted a positive relationship with the Taliban, despite Russia's contentious history with Afghanistan. In fact, Moscow has been building contacts with the Taliban since talks began in 2018. However, the Taliban is still designated as a terrorist organization by Russia, and Russia has yet to recognize the newly ascendant government.<sup>9</sup> In fact, in late August, Russia sent four (4) military planes to evacuate 500 of its citizens and those of regional allies amid the chaotic takeover.

Russia has also reinforced its military base in Tajikistan, which shares an 843-mile border with Afghanistan.<sup>10</sup> This may demonstrate wariness about the Taliban holding legitimate power, although Russia has evidenced no plans to use force to influence Afghan affairs. In fact, Russia has joined China and Pakistan in offering aid to the Taliban, while still withholding recognition



and pressuring the regime to keep its promises to respect women and ethnic minorities.<sup>11</sup> Russia is significantly concerned about the effects that a disrupted Afghanistan will cause among the nine (9) member countries of the Commonwealth of Independent States (CIS), which is the regional intergovernmental organization of nine (9) former Soviet Republics in Eurasia. However, Russia has instructed the other members not to serve as a staging area for U.S. or NATO forces. This demonstrates the balancing act that the Kremlin is attempting to maintain amid fears of Islamist militants crossing into the former Soviet republics of Central Asia.**Error! Bookmark not defined.**<sup>12</sup>

The Kremlin is also attempting to maintain its relationships with India and Pakistan, the latter of which has long supported the Taliban. Pakistan recognized the initial Taliban government in Afghanistan in the 1990s and provided material support during the ongoing insurgency under U.S. occupation. However, Pakistan's leverage may be diminished given that the Taliban has actually regained control. Russia has backed India's efforts to host a regional conference regarding Afghanistan on 10 November 2021 with the two (2) sides reportedly seeking facilitation by Russian security council Secretary Nikolai Patrushev. The Kremlin has supported the conference, but the Taliban has not been invited.<sup>13</sup> China, Uzbekistan and Tajikistan have been invited to participate. Pakistan was invited but declined to attend, citing ongoing tensions with India.<sup>14,15,16</sup>

## Iran

Iran has not taken any major steps with regards to the situation in Afghanistan, with one expert noting that Iran likely sees Taliban rule in Afghanistan as “both an opportunity and a threat.”<sup>17</sup> On 27 October 2021, Iran hosted a one-day conference with representatives from Pakistan, Tajikistan, Uzbekistan and Turkmenistan, with representatives from China and Russia attending via video link.<sup>18</sup> Iran's position on Afghanistan will continue to evolve based on conversation with regional partners, as well as its own tenuous cooperation with the Taliban.

Iran is an overwhelmingly Shi'a country (with a Shi'a government), which stands at odds with the Taliban's Sunni identity. This sectarian divide has led to concerns regarding the Taliban government's treatment of Shi'a citizens in Afghanistan.<sup>17</sup> Moreover, Iran likely remains concerned about the Taliban's ability to keep the Islamic State's Khorasan branch (IS-K) at bay. Iranian officials have reportedly expressed concern that IS-K could launch further attacks on Shi'as in Afghanistan or use the country as a base of operations in order to conduct attacks on Iran itself.<sup>19</sup>

Iran has also long been a destination for Afghan refugees, and the recent Taliban takeover of Afghanistan has reportedly resulted in an uptick in asylum seekers.<sup>19</sup> Precise figures regarding the overall number of asylum seekers are not available, although in early October 2021 a Russian official stated that an estimated 3 million refugees were trying to reach Iran and Pakistan.<sup>20</sup> A few weeks later, an Iranian official stated that the country was hosting 300,000 new Afghan asylum seekers.<sup>21</sup> Regardless of the true number, Iran is facing a staggering humanitarian exodus that will likely have significant impacts on its political, economic, and security affairs.

In early October 2021, a Taliban delegation met with Iranian representatives to discuss the issue of trade. The two parties agreed to a number of conditions, to include increasing trading hours at



a key border crossing as well as “better regulat[ing] the collection of tariffs and improv[ing] roadworks.”<sup>22</sup> A Taliban commerce official also recently announced the group is eager to buy oil from Iran, which could signal future trade cooperation between the two parties.<sup>18</sup>

## Conclusion

Though China, Russia, and Iran have their own unique set of interests, objectives, concerns, and challenges related to the Taliban takeover of Afghanistan, each country is seeking to navigate a difficult relationship both with the new Taliban government, as well as with other powers on the world stage. Though the Taliban has only held power for a few months as a self-declared government, it is likely that nation-states will slowly begin to accept the Taliban’s de facto rule in order to conduct necessary diplomacy, trade and security cooperation. RMC’s Intelligence & Analysis Division will continue to monitor geopolitical developments related to Afghanistan and will provide relevant updates as necessary.

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