Introduction

• This analysis provides a summary overview on the impact of the U.S. and Afghan central government defeat by the Taliban, on the image of the U.S. in the world, on Afghanistan’s potential global and regional impacts, and on Afghanistan’s probable impact on regional and global extremism and terrorism. It also addresses the Taliban’s probable impact on Afghanistan and some of the key lessons the U.S. and its strategic partners should learn from the war.

• It estimates that China and Russia – along with other regional powers – will attempt to exploit the situation and that the primary threats of the regional powers around and near Afghanistan will be their own internal instability, divisions, and weak governance.

• It highlights failures in the U.S. approach to strategic partnership with Afghanistan and the failures of the U.S. to understand that it faced a major and growing insurgency rather than a terrorist and extremist threat, along with the U.S. failure to address the corruption, incompetence, and weakness of the Afghan central government.

• It argues that the U.S. defeat is likely to have only a limited strategic impact on the reputation of the U.S. in most of the world and that global attention had already discounted the U.S. defeat after the U.S. had announced its withdrawal and the peace negotiations with the Taliban. It also argues that the primary causes of that defeat were the failures of the Afghan government and political culture and that the governments of fragile states are not limited to only the threat posed by terrorism and extremism – with civil war and major insurgencies – caused largely by the failures of national governments – driving instability and unrest.

• Comments should be addressed to Anthony H. Cordesman (acordesman@gmail.com)
Impact on the United States
Global Impact on U.S. Strength and Credibility

• Probably limited regionally, globally, and in terms of U.S. role and prestige:
  o One more troubled state in troubled region with minimal strategic importance except to neighbors.

• Many similar risks of extremism, violence, terrorism, human rights on global basis in a world of competition and crises:
  o 20% - 25% states present similar levels of instability in time of COVID, sectarian/ethnic/tribal crisis, failed governance and economies, local tensions and major power competition.

• Impact on U.S. or “defeat” likely to be short term: Losing a failed state has limited time impact (Viet Nam) compared to broader political and economic image of U.S., perceived value as a strategic partner

• But, “wild cards” play themselves!
Afghanistan and Strategic Triage

- Area of marginal strategic value to U.S. – intervention driven by impact of Attacks on World Trade Center and Pentagon

- Loss of fight against Taliban offset by fact U.S. had effectively withdrawn, and by prior killing of Bin Laden, failures of its leaders and status as failed state, lack of strategic importance, fact many other states present equivalent risk.

- Taliban “victory”: will lead to a major human tragedy but no clear option for “winning” that could have produced a stable, meaningful victory.

- U.S. departure now forces Taliban to try to establish a functioning government in the face of threats like ISIS. Lack of any effective economy or structure of governance.

- Some impact on China (Wakhan Corridor/Uyghurs), Russia, Iran, and Pakistan plus Kazakhstan, Kyrgyz Republic, Tajikistan, Turkmenistan, and Uzbekistan.


- Will the U.S. develop credible plans for competition with China, Russia, North Korea, Iran, global extremist threats – JADO/Strategic Partnerships.
Fragile States Index 2021

Global Challenge

Adapted from the Fragile States Index Report 2021, https://fragilestatesindex.org/analytics/fsi-heat-map/
The Broader Fragile States Crisis in a Covid World

Failed GDP Growth

Rising Violence and Conflict

Growing Food Crises

Rising Debt

Limited Impact on a Region Filled with Neighboring States with Their Own Problems
Afghanistan’s Strategic Position

Adapted from Research Gate, https://www.researchgate.net/figure/Map-of-southwest-Asia_fig1_235967637
UN Least Developed Country Status

Grossly Corrupt, Ineffective Former Government in a Region of Poor to Ineffective Governments

Grossly Corrupt State Under Previous Regime in a Corrupt Region

Impact on Major Neighbors

• Pakistani “victory” has led to major aid demands, and partly faded into border crisis over Durand line, Pakistani, Taliban, and ISIS.

• Iran seeking stability, avoid crisis over Hazara and Shi’ite minority, limit drug exports, limited support of extremists in Southeast. Trade aid to Taliban for stability if it can get it.

• Russia seeking ties and stability – by providing aid and recognition. “-Stans” act as a major buffer to direct extremism, but challenge Russia, Shanghai Cooperation Organization, security pacts.

• China also seeking ties and stability by providing aid and recognition. Motives are (Wakhan Corridor/Uyghurs), Counter to India, Influence Iran, Mines?, Shanghai Cooperation Organization.
In October 2007, the CSTO signed an agreement with the Shanghai Cooperation Organization (SCO), in the Tajik capital of Dushanbe, to broaden cooperation on issues such as security, crime, and drug trafficking.

On 6 October 2007, CSTO members agreed to a major expansion of the organization that would create a CSTO peacekeeping force that could deploy under a U.N. mandate or without one in its member states. The expansion would also allow all members to purchase Russian weapons at the same price as Russia.

In July 2021, Tajikistan appealed to members of CSTO for help in dealing with security challenges emerging from neighboring Afghanistan. Thousands of Afghans, including police and government troops, fled to Tajikistan after Taliban insurgents took control of many parts of Afghanistan.

On 5 January 2022, the CSTO was deployed to Kazakhstan in order to help quell the 2022 Kazakhstan protests.

Impact on Shanghai Cooperation Organization (SCO)?

The Shanghai Cooperation Organization (SCO), also known as the Shanghai Pact, is an Eurasian political, economic, and security alliance. It is the world's largest regional organization in geographic scope and population, covering three-fifths of the Eurasian continent, 40% of the world population, and more than 20% of global GDP. The SCO is the successor to the Shanghai Five, a mutual security agreement formed in 1996 between China, Kazakhstan, Kyrgyzstan, Russia, and Tajikistan. On 15 June 2001, the leaders of these nations and Uzbekistan met in Shanghai to announce a new organization with deeper political and economic cooperation; the SCO Charter was signed on 7 July 2002 and entered into force on 19 September 2003. Its membership has since expanded to eight states, with India and Pakistan joining on 9 June 2017. Several countries are engaged as observers or partners.

Afghanistan and the "-Stans"

Impact on “-Stans” Limited

• **Kazakhstan:** No common border. Authoritarian state. Ongoing internal leadership crisis. Minimal ties to Afghanistan.

• **Kyrgyz Republic:** No common border. Some democratic progress. Continuing concerns include democratization, endemic corruption, a history of tense – and at times violent – interethnic relations, border security vulnerabilities, and potential terrorist threats.

• **Tajikistan:** Electoral system rife with irregularities and abuse. President Emomali Rahmon, who came to power in 1992 during the civil war and was first elected president in 1994. Banned the last major opposition political party in December 2015, Rahmon had himself declared "Founder of Peace and National Unity, Leader of the Nation," with limitless terms and lifelong immunity.

• **Turkmenistan:** Gas exporter, but weak economy. President for life Saparmurat Niyazov died in December 2006, and Gurbanguly Berdimuhamedow, emerged as new president. Berdimuhamedow won Turkmenistan's first multi-candidate presidential election in February 2007, and again in 2012 and in 2017 with over 97% of the vote.

• **Uzbekistan:** Has diversified agricultural production, developed mineral and petroleum export capacity, and increased manufacturing base. Uzbekistan’s first president, Islam Karimov, led Uzbekistan for 25 years until his death in September 2016. His successor, former Prime Minister Shavkat Mirziyoyev, has improved relations with Uzbekistan’s neighbors and introduced wide-ranging economic, judicial, and social reforms. Mirziyoyev was reelected in October 2021 with 80% of the vote.
Impact on Terrorism Likely to Be Just One More Source of Pressure in a Remote Area with an Impact More on Russia and China
One More Terrorist “Wild Card” in a Troubled World

Countries with Active Terrorism Extremist Incidents in 2020

Impact on Afghanistan Will Be Years of Failed Governance and Existence as an Unstable Failed State
The Challenges to the Taliban and Any Other Successor

• Massive uncertainty in Taliban’s transition to governance: Most such movements change radically in making such transitions. Most without a disciplined and charismatic leadership change radically. Collapse or mutate in a few years.

• Radicalize, divide, strong leader emerges. ISIS? Hardliners?

• No economy other than aid or drugs to build-upon. Declining GDP per capita, rising poverty rates after 2014. Now near collapse and famine.

• Ghani government was failed and corrupt. World Bank rated as one of worst in world.

• Deeply divided at sectarian, ethnic, regional levels.

• Uncertain modernization efforts were highly localized and urban. Many claims of progress exaggerated. (Highest infant mortality rate in the world.)


• Neighbors largely bypass except for limited trade. “New Silk Road” a dream. Mining years from success – if ever.

• Proposed emergency humanitarian requires well over $1 US billion that buys time, but does not offer solutions.

• Sustaining means some $2.5 to $4 billion a year to remain a Fragile or Failed state for years to come, but…
Taliban’s Future Impact on Afghanistan Is Highly Uncertain

• Can the Taliban hold together and form a real government?
• Will it divide into feuding factions and power brokers?
• Can it get enough outside aid to survive transition?
• What kind of governance and economy can it create?
• Can the Taliban evolve enough to cope with reality?

History warns prospects are poor: Most Revolutionary movements do not survive “success” without strong charismatic leader and even then, they stagnate and lose even regional influence.
Any Successor Must Take Over a Beggar State

• Dishonest claims abut progress in economics, education, and health disguise a nation in crisis under previous regime. World Bank estimates poverty has risen steadily since 2014.

• International assistance funded nearly 45% of Afghanistan’s gross national product and 75% percent of government’s budget.

• Much, if not most, of this funding was wasted or stolen.

• Many government workers are gone; most have not been paid for months, and key services have not functioned or been funded properly since collapse and the first province fell.

• No credible estimates of aid needed to both meet immediate humanitarian needs and to fund shift toward stable growth, but drought, war, corruption, and incompetence have clearly raided levels to billons of dollars a year.

• Press reports indicate that some estimates show that 22.8 million people — more than half the country’s population — will face potentially life-threatening food insecurity this winter.

• Population growth massively outstripped creation of real jobs, particularly in urban areas, before Taliban conquest.
Terrible Governance 2021

Minimal civil capability to survive and improve

Taliban Inherits Immediate Food Crisis

“Over 22 million people, more than half the country’s population, are facing crisis-levels of hunger, the majority of them unable to guarantee when their next meal is going to be, according to the U.N. World Food Program.

This marks a dramatic increase since September, when more than 14 million people were at risk of going hungry. The organization also estimated that in December, 95 percent of the population had insufficient food consumption, adopting measures to cope with their situation by skipping a meal, for example.

Since October 2020, when drought struck Afghanistan, the situation has continued to get worse.”*

Humanitarian Aid Requirements Alone Border on the Impossible, and At Best Only Buys Time

Probable Lasting Impact of Current Financial Crisis

- Foreign aid financed some 70-80% of government before the collapse.
- No major export aside from drugs.
- Corruption at every level.
- No effective effort to police the use of aid and government funds or to measure effectiveness.
- Taliban ideology opposes effective development in many areas.
- Can a meaningful development program and financial system actually be created?

World Bank & IDB Estimate of Demographic Pressure


- 2040: 54.4 Million
- 2020: 38.9 Million
- 2010: 29.1 Million
- 2000: 20.2 Million
- 1990: 12.4 Million
- 1980: 13.4 Million
- 1970: 11.2 Million
- 1960: 8.9 Million

Median Age: 19.5 Years

Urbanization: 26.3%
At Least Several Coming Years of Failed Governance and Development

• Praise of Afghan civil development was as false as praise of military development.
• The collapsed Afghan central government was a corrupt and incompetent mess with a steady rise in the poverty rate from 2014 onwards, only island of success was education and health, including failed governance and rival power brokers outside of Kabulstan.
• No clear Taliban structure of governance seems to exist as a substitute.
• A massive financial crisis and potential famine already exist that the Taliban cannot deal with internally.
• “Over 22 million people, more than half the country’s population, are facing crisis-levels of hunger, the majority of them unable to guarantee when their next meal is going to be, according to the U.N. World Food Program. This marks a dramatic increase since September, when more than 14 million people were at risk of going hungry. The organization also estimated that in December, 95 percent of the population had insufficient food consumption, adopting measures to cope with their situation by skipping a meal, for example. Since October 2020, when drought struck Afghanistan, the situation has continued to get worse.”*  
• Humanitarian aid is easy to waste and often to steal, and only buys time. It does not develop or create stability.
• Most revolutionary movements can survive success with the leadership structure and the momentum they have at the time of victory, and many do not survive the effort to govern.
• Many other “fragile” countries face the same challenge that are of greater strategic importance to the U.S. and its allies.

Lessons for U.S. Strategic Partnerships
Key Lessons for U.S. and “Strategic Partners: The Four Real World Threats in Irregular and Insurgent Warfare

1. The Enemy(ies), which are usually well established and have made major gains before U.S. military intervention begins.

2. The Government or Strategic Partner (whose gross failures allowed a major threat to evolve)

3. The United States (whose ignorance of the country, division of its civil-military effort, effort to impose its own approach to warfighting, and lack of strategic triage can be critical.)

4. Foreign and neighboring states which almost inevitably create addition threats and problems. (Pakistan, Iran?)

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The Cost of War
FY2000-FY2021
($US billions)

Key U.S. Force Building ($81B) and Economic Development Aid ($21B)

Afghan Force Development vs. Afghan Violence: 2004-2010

Number of average daily attacks per month

- Total average daily attacks
- Average daily attacks against ISAF and coalition forces
- Average daily attacks against civilians
- Average daily attacks against ANSF

Source: GAO analysis of DOD data.

U.S. Troop Levels in Afghanistan 2002-2021


1 Projected for 2018 based on public statements of NATO Secretary General Jens Stoltenberg. According to USFOR-A, the publicly releasable U.S. troop level as of March 1, 2016, remains 14,000.

2 On January 15, 2021, the number of U.S. troops in Afghanistan was 2,500; the number dropped to 660 by late June/early July as U.S. forces withdrew; peaked at 5,784 in late August as the U.S. deployed forces to assist with the Noncombatant Evacuation Operations; and went to zero on August 30, 2021.
Living in Denial

Long War Journal Estimate on Taliban Control and Contested Districts: 29/9/2015

- Districts with extreme threat levels either have no government presence at all, or a government presence reduced to only the district capital. There were 88 such districts scattered through 54 of the country’s 34 provinces.
- In all, 23 of Afghanistan’s 34 provinces had some districts where the threat level was rated high or extreme.

UN Estimate of Overall Risk from Taliban to Aid Workers 12/10/2015

A Long War with High Enemy Initiated Attack Levels

2002-2021


Note: This quarter’s data is as of April 29, 2021. The “as of” date of the data each quarter is between the 25th and 31st of the indicated month. APPS = Afghan Personnel and Pay System; ANA = Afghan National Army; AAF = Afghan Air Force; ANP = Afghan National Police; ANDSF = Afghan National Defense and Security Forces. No civilians are included in the strength numbers.

Racing to Defeat: April 2021-July 2021

Taliban Completes Its Conquest: August 6-September 5, 2021


### ANDSF Assigned and Authorized Strength

<table>
<thead>
<tr>
<th>ANDSF Component</th>
<th>Authorized Strength</th>
<th>Assigned Strength</th>
<th>% of Target Authorization</th>
<th>Difference Between Assigned and Authorized</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANA including AAF</td>
<td>227,103</td>
<td>162,415</td>
<td>71.5%</td>
<td>64,688 (28.5%)</td>
</tr>
<tr>
<td>ANP</td>
<td>124,626</td>
<td>91,435</td>
<td>73.4%</td>
<td>33,191 (26.6%)</td>
</tr>
<tr>
<td><strong>ANDSF Total</strong></td>
<td><strong>351,729</strong></td>
<td><strong>253,850</strong></td>
<td><strong>72.2%</strong></td>
<td><strong>97,879 (27.8%)</strong></td>
</tr>
</tbody>
</table>

### Diagram:

Afghan National Army & Police: 10/2019 – 4/2021


Note: This quarter’s data is as of April 29, 2021. The "as of" date of the data each quarter is between the 25th and 31st of the indicated month. APPS = Afghan Personnel and Pay System; ANA = Afghan National Army; AAF = Afghan Air Force; ANP = Afghan National Police; ANDSF = Afghan National Defense and Security Forces. No civilians are included in the strength numbers.