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Dismantling Afghanistan's Opium Empire

How the heroin-rich Taliban could become the world's most ironic counter-narcotics champion

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On Friday, February 14, 2020 the world got a valentine of sorts from Doha. The Afghan Taliban and U.S. negotiators signed a seven day "reduction in violence" agreement in Qatar -- short of a full-fledged cease fire, but essentially halting hostilities between two adversaries that have been at war for nearly two decades. If the week-long hiatus proves that Taliban commanders still have the command and control needed to restrain their factionalized fighting force, the likely next step is a bilateral deal between the U.S. and Taliban that could end America's longest conflict.

But a negotiated settlement to the war in Afghanistan ultimately depends on a deal being struck between the government in Kabul and the Taliban, which the latter has frozen out of peace talks to-date calling them a puppet regime of America. This is likely to change following a U.S.-Taliban deal, since what the insurgents really want, they can only get from the Afghan Government. Since the toppling of their regime in 2001, the Taliban have demanded recognition from Kabul as a legitimate political actor in a country where they enjoy substantial support among segments of the population,



Afghan opium poppies photo: Wikimedia Commons user Davric

not least for their ability to dispense credible justice in the eyes of many Afghans, their steadfast rejection of foreign occupation, and for the economic and infrastructural systems they helped cultivate and on which nearly all rural Afghans depend. This last element is key and is owed to the fact that the Taliban have a near monopoly on a global commodity representing a \$4 billion dollar a year industry that necessitates the sustainment of elaborate supply chains: opium.

According to the UN Office on Drugs and Crime (UNODC), Afghanistan produces an estimated 90-95% of the world's heroin, the majority trafficked to Europe and Asia by the Taliban and their affiliates [1]. Sourced from a network of more than half a million Afghan poppy farmers with no livelihood alternatives that come close to rivaling the returns they get from selling illicit crops to the Taliban, the Afghan opium trade has been the cash cow for the insurgent group.

A deeper conflict analysis foretells a future in which the Taliban could soon be incentivized not only to walk away from its lucrative drug empire but become an ardent counter-narcotics partner to the Kabul government and its international backers.

Large-scale crop replacement and poppy eradication campaigns have failed in Afghanistan not just because the financial incentives and expectations the Taliban puts on farmers easily outweigh any reason to abandon opium cultivation, but because the rural supply chains reinforced by the drug economy are key to licit markets and daily life in Afghanistan as well. The roads, transport networks, hawalas, and even security necessary to move and protect drugs and money also facilitate the flow of foodstuffs, salaries, people, and consumer goods. Given the massive cash and legitimacy dividends the Taliban gains from being one of the largest narco-traffickers in the world, it seems impossible to imagine what could ever entice them to walk away from the drug trade when the incentives to stick with it are evident in the following causal loop:



But a deeper conflict analysis following the February 14th deal foretells a future in which the Taliban could soon be incentivized not only to walk away from its lucrative drug empire but become an ardent counter-narcotics partner to the Kabul government and its international backers.

[1] <https://www.unodc.org/unodc/en/frontpage/2018/May/last-years-record-opium-production-in-afghanistan-threatens-sustainable-development--latest-survey-reveals.html>

Politics by Other Means

A one-time state actor turned anti-state insurgency, the Taliban's motives have always been political, not economic. It's power they seek, and drug trafficking is just a means to that end. In political science terms, what the Taliban have wanted since their ouster in 2001 is state capture, or more accurately, partial state re-capture. In other words, they want to be a legitimate political actor that is part of the Afghan state. Their strategy to achieve this has always been remarkably simple. Step one? Resource an insurgency – largely with drug money -- that creates leverage to bargain for their political goals. Check. Step two? Get the internationals out of the country through negotiated troop withdrawals by leveraging Taliban control over violence and chaos. With this deal, the Taliban is closer than ever to achieving this intermediate objective. Step three? Strike an "intra-Afghan" deal with the government in Kabul that ends offensive action against the insurgency and its supporters and establishes terms for the Taliban to regain a place in state institutions.

Whether the terms of such an intra-Afghan deal simply permit the Taliban the right to compete for elected positions or yield quota guarantees for seats in central or provincial government depends on the stealth of Taliban negotiators and the will of the Ghani Administration, freshly re-elected just this month [2]. Bitter towards the Taliban for years of anti-state activity and intent on leading his country according to democratic, law-based political-economic norms, the former World Bank economist-turned Afghan President Ashraf Ghani is understandably reluctant to cede much power to a narco-terrorist enemy of the state. But consider the following Theory of Change that lays out how the Taliban's calculus may shift towards a pro-state, anti-drug agenda if the right kind of peace deal with the government is struck:

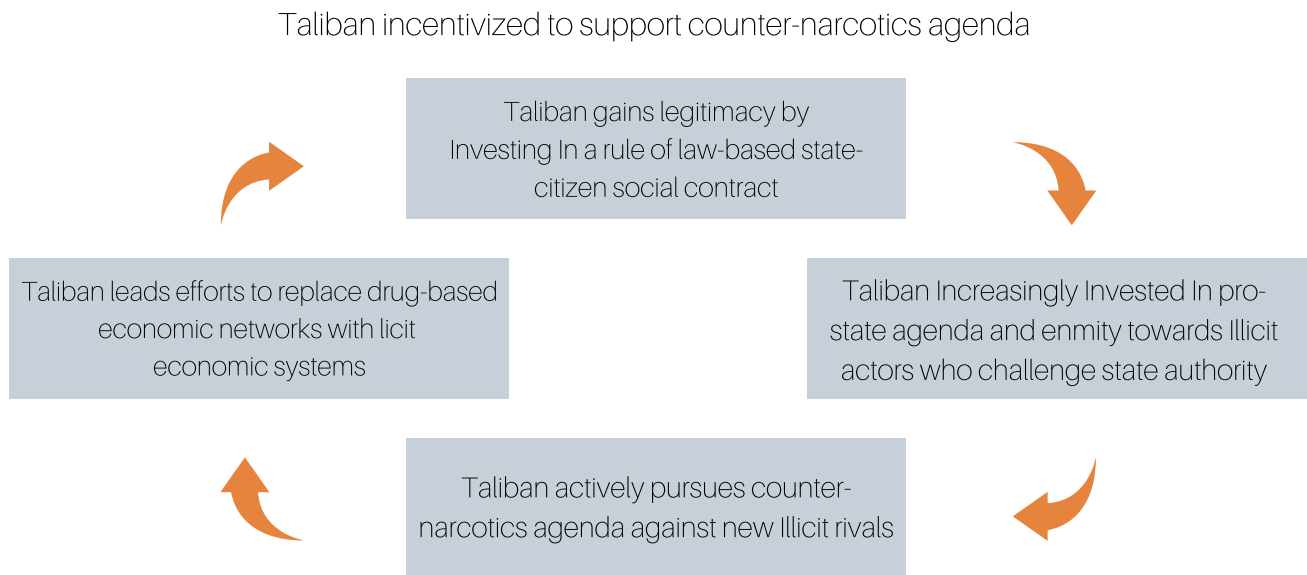


Put simply, with a peace deal positioning them to realize their central goal of (partial) state (re)capture, the Taliban are likely to opt-in to pro-state institutions from which they would derive power, and opt-out of the lucrative but distracting drug business – perhaps going a step further to embrace a counter-narcotics agenda to ensure new rivals don't fill the power vacuum they leave behind. The Taliban's post-peace deal support for a counter-narcotics agenda is logical, since ignoring future illicit networks would undermine the group's claim of being a legitimate governing authority and forfeit the opportunity for them to lead Afghanistan's transformation away from a narco-state.

[2] <https://www.nytimes.com/2020/02/18/world/asia/afghanistan-election-ashraf-ghani.html>

Well positioned to do so, the Taliban has the reach and influence to facilitate sweeping shifts in the rural supply chain and infrastructure networks they currently control towards licit economies and state support. It is possible that instead of dismantling their opium empire the Taliban could attempt to sustain a shadow drug trade, deriving power through licit political channels and cash through illicit economic ones. But this assumes the Taliban has the means and will to split their attention and resources and that they are willing to risk the reputation they enjoy among many Afghans who see them as incorruptible [3].

If conditions at each stage of the Theory of Change above were met, it follows that a new causal loop could emerge as follows:



Let's Not Leave it to Fate

To increase the chances of such an outcome, there is much that can be done now. First, U.S. and Afghan officials should seek to validate the assumptions above through direct dealings with the Taliban and through indirect means (read: third-party research and intelligence). If the logic holds, American negotiators should condition near-term deals with the Taliban related to phased U.S. troop withdrawals on the Taliban developing plans to transition its drug-oriented supply chains towards licit economies. It is unrealistic, though, to expect the Taliban to implement such shifts before they reach a deal with the Afghan Government, since political-economic dominance in poppy-dependent rural areas is a key bargaining chip for the group. Also, a Taliban withdrawal from the drug business too soon risks creating vacuums for rogue networks that would force Taliban warlords to continue engaging in localized violence against non-state rivals, eroding the chance of a disarmament settlement with the government.

[3] <https://www.tandfonline.com/doi/full/10.1080/17502977.2017.1353755>

Second, the Ghani Administration should carefully consider the terms and conditions of a peace deal with the Taliban as it relates to the group's involvement in drugs and their potential role as a partner in a counter-narcotics agenda. Here, the government in Kabul has leverage. It can condition opportunities for the Taliban to gain access and authority in state institutions on the group's ability to divest from and transition narco-trafficking operations region-by-region. Despite the risk of losing face, President Ghani should recognize – and state publicly to set the stage for intra-Afghan negotiations-- that his Administration and the Taliban both stand to gain by cooperating around interdiction and enforcement strategies to contain or defeat future criminal drug networks who could soon be mutual rivals. Though cooperating with the Taliban to combat the opium trade will surely seem ironic and unsavory to the Ghani Administration, it can be made palatable if the international community (read: the U.S.) commits to maintaining or increasing technical and financial support for counter-narcotics efforts in the country even as military involvement there draws down.



Former Talib prepares his hash Photo: by MastaBaba is licensed under CC BY-NC 2.0

In addition to radically curbing violence that has killed thousands of Afghans and internationals, the closer-than-ever Afghan peace deals may be a surprising boon for the global counter-narcotics agenda and motivate the Taliban to become its unlikely champion.

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