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BEYOND THE EMIRATE

THE UNSIGNED GUARANTEE

KHARJEEYAT, ALLEGIANCE, AND THE REGIONAL COST OF FIVE YEARS OF TALIBAN RULE



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The Unsigned Guarantee

Kharjeeyat, Allegiance, and the Regional Cost of Five Years of Taliban Rule

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ABOUT THIS BRIEF

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A NOTE ON TERMS

The term kharjeeyat is used as an analytical lens, not as a theological ruling, and it is not applied to Afghan society.

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AT A GLANCE

Five Years in Eight Numbers

2.6m

Girls denied secondary education since 2021

UN CHILDREN'S FUND (UNICEF), AUG 2026[1]

1,063

Militant attacks in Pakistan in 2025, the deadliest year in a decade

PAKISTAN INSTITUTE FOR CONFLICT AND SECURITY STUDIES (PICSS)[2]

6,000

Fighters of Tehreek-e-Taliban Pakistan (TTP) estimated to be on Afghan soil

UNITED NATIONS (UN) MONITORING TEAM[3]

20+

Militant groups the UN says are active in Afghanistan

UN MONITORING TEAM[3]

−28%

Fall in Pakistan–Afghanistan trade, 2024 to 2025

KABUL TRADE MINISTRY DATA[4]

3 in 4

Afghans unable to meet basic needs in 2025

UN DEVELOPMENT PROGRAMME (UNDP)[5]

19.2m

People facing acute hunger this winter

WORLD FOOD PROGRAMME (WFP), OCT 2026[6]

0

Signed, verifiable counter-terrorism texts between Kabul and Islamabad

DD ASSESSMENT

EXECUTIVE SUMMARY

In Brief

Five years after 15 August 2021, the Taliban administration runs a state the first Emirate never had. It now has ministries, a customs service, and domestic revenue worth 19.8 per cent of gross domestic product (GDP).[7] What it does not have is a security policy its neighbours can rely on. This brief explains why, and what to do about it over the next 12 months.

KEY JUDGEMENTS

01 Kabul's security policy follows an allegiance rule.	The administration fights the group that declares its leader an apostate, Islamic State Khorasan Province (ISKP), and tolerates the groups that have pledged allegiance to him (the TTP and al-Qaeda). UN monitors judge the Taliban "unlikely to confront or act against TTP".[3]
02 That is why the guarantee stays unsigned.	In Istanbul in November 2025, Kabul's delegation accepted Pakistan's position in discussion but would not commit it to paper.[8] A written, verifiable promise against the TTP would require the Amir to act against men sworn to him.
03 Kharjeeyat explains part of this, but not all of it.	The pattern of rigid interpretation, rejection of mediation, and widening takfir is real and documented. Factional rivalry, Pashtun kinship ties, fear of defections to ISKP, and the economics of a war-shaped state matter as much.
04 Pakistan carries the heaviest cost.	2025 was its deadliest year in a decade, with 1,063 attacks and 664 security personnel and 580 civilians killed.[2] Bilateral trade fell by about 28 per cent.[4]
05 Afghans carry the deepest cost.	More than 2.6 million girls have been denied secondary education.[1] Three in four people cannot meet their basic needs,[5] and only 26 per cent of this year's humanitarian plan is funded.[9]
06 The north is the fault line to watch.	In Badakhshan, armed resistance, foreign militants, and mining disputes now overlap. In July 2026 the Taliban lost control of a district centre for the first time since 2021.[10]

WHAT THIS MEANS FOR THE NEXT 6-12 MONTHS

The most likely course is talk without text. Crossings will open and close in cycles, strikes will recur, and talks will continue through Qatar, Türkiye, and China without closing the gap. Only three developments would change that. Kabul could sign a verifiable text, TTP leaders could be verifiably moved away from the border, or order could break down in the north. DD's advice is simple. Judge Kabul by what it will sign and allow others to verify, not by what it says in the room.

THE CORE ARGUMENT

Kabul Will Say It. It Will Not Sign It.

In November 2025, in Istanbul, Pakistan and the Taliban administration came close to a deal. According to Pakistan's Defence Minister, the Afghan delegation agreed with Pakistan's position across the table and then declined to put it in writing. "Final agreements in international negotiations are recorded in writing," he said.[8]

This brief argues that the missing signature is not a negotiating tactic. It is a structural limit.

Look at whom Kabul fights and whom it hosts. It wages a sustained campaign against ISKP, the group that declares the Taliban leadership apostate.[11] It does not act against the TTP or al-Qaeda, both of which have sworn bay'ah, or allegiance, to Haibatullah Akhundzada as Amir al-Mu'minin.[12,13]

We call this **the allegiance rule**. In Kabul's security policy, the response to an armed group depends less on what it does to Afghanistan's neighbours than on whom it obeys.

A written, verifiable guarantee against the TTP would ask the Amir to move against men who have pledged themselves to him. In a movement whose legitimacy rests partly on that bond, the leadership has so far refused to pay the price. The assurance is therefore offered in the room and withheld on paper.

The allegiance rule is a lens, not a verdict. It does not explain everything, as the academic reading on the opposite page shows. It does, however, predict behaviour better than the official line, and it points to a clear test for the next 12 months, built on **paper, distance, and verification.**

> "The assurance is offered in the room and withheld on paper."

TWO READINGS OF ONE PROBLEM

Should Pakistan Insist on a Written, Verifiable Guarantee from Kabul?

This brief argues that Kabul will not sign. Whether Pakistan should keep insisting on a signature is a separate question, and it is answered differently in official and academic circles. We set out both readings in their strongest form.

THE STATE'S READING

How Islamabad Frames the Problem

1. **The demand is narrow and consistent.** Afghan soil must not be used for attacks on Pakistan, and any commitment must be concrete and verifiable.[14]
2. **Assurances have not reduced the violence.** In 2025, attacks in Pakistan rose by 17 per cent and deaths by 73 per cent.[2]
3. **Kabul has signed before.** The Doha Agreement of 2020 contains written counter-terrorism commitments,[15] so a written text is not a new demand.
4. **Engagement came first.** Pakistan relied on visits, joint committees, and border meetings for four years before turning to pressure.[16]

THE ACADEMIC READING

How Scholars and Analysts Complicate the Picture

1. **A signature may be the one thing Kabul cannot give.** If allegiance binds the TTP to the Amir, insisting on paper risks locking in deadlock.
2. **Closures carry a social cost.** They fall hardest on traders, farmers, and border families, and they push Afghan trade towards Iran and Central Asia.[4]
3. **Observable steps may matter more.** Relocating TTP cadres or making arrests could be worth more than a text that is never enforced.
4. **Attribution is still questioned abroad.** In April 2026, UN human-rights experts asked for stronger evidence linking specific attacks to Afghan soil.[17]

WHERE THE TWO READINGS MEET

Both readings accept that the TTP's sanctuary is the core problem, that dialogue must continue, and that verification by a trusted third party would serve both countries.

DD's own reading of the evidence is set out in Section 11.



Illustration by Digital Debate

PART I

Concept and Allegiance

What kharjeeyat means, what it does not explain, and why allegiance shapes Kabul’s choices.

1 Kharjeeyat as a Lens, Not a Label

IN ONE LINE

> Kharjeeyat helps explain how armed groups justify war on fellow Muslims. It does not explain everything Kabul does.

What the Term Means

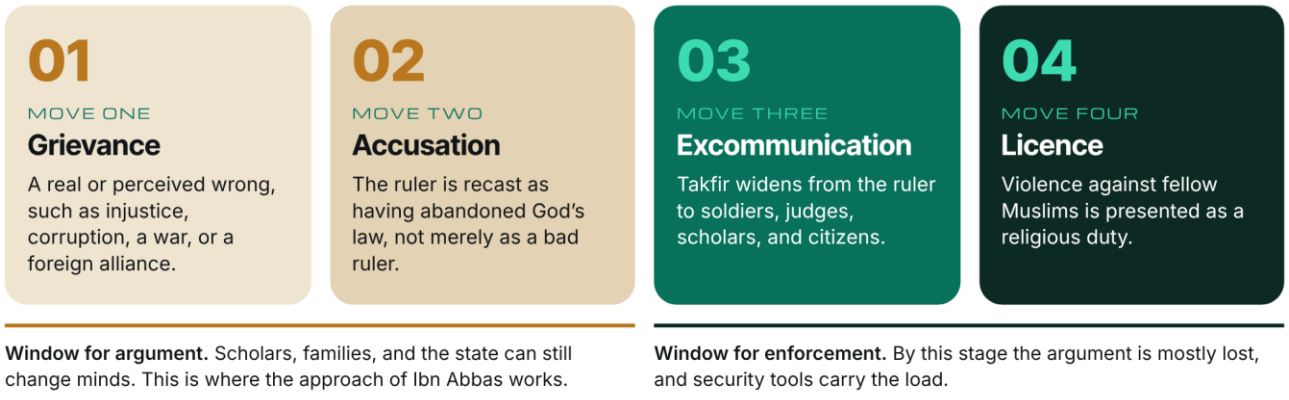
Kharji comes from the Arabic root *kharaja*, to leave or depart. In classical usage, the Khawarij were those who left the community over a political dispute and then justified violence against fellow Muslims in religious terms. In this brief, **kharjeeyat** names a recurring pattern of thought with three features.

- **Rigid interpretation.** Texts are read literally and in isolation from the scholarly tradition.
- **Rejection of mediation.** Established scholarly and political authority is treated as illegitimate.
- **Widening takfir.** The charge of unbelief is extended from individuals to rulers, institutions, and whole societies.

Classical jurists made takfir, the judgement that a Muslim has left the faith, deliberately hard to reach. They required clear evidence, a chance to explain or retract, and a ruling by competent authority rather than by an individual or an armed group. Al-Ghazali warned that wrongly excluding a believer was graver than wrongly including one.[18] The modern pattern drops these conditions. Takfir becomes the starting point of an argument, not the end of a legal process.

FIGURE 1 **From Grievance to Licence in Four Moves**

How a grievance becomes a justification for violence



Source: Digital Debate framework, drawing on classical jurisprudence on takfir and DD Research Desk consultations.[19]

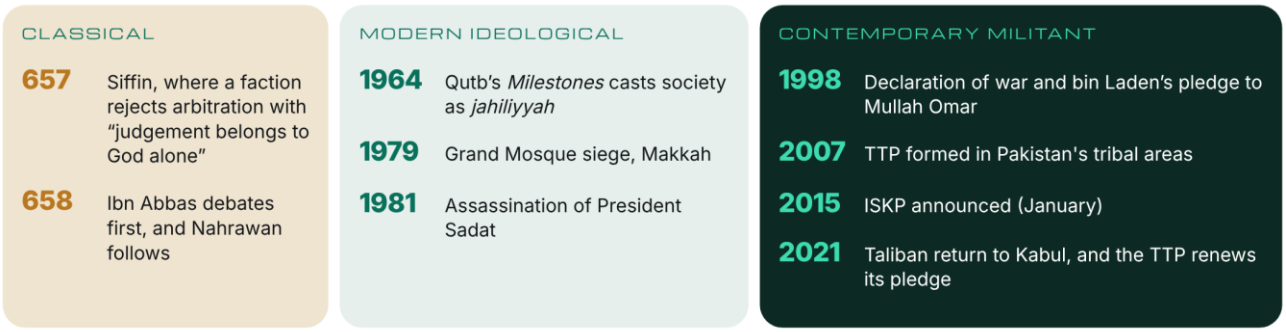
Where the Pattern Comes From

The pattern has early roots. At Siffin in 657 CE, a faction rejected arbitration between Caliph Ali and Muawiyah with the slogan "judgement belongs to God alone" and declared both men unbelievers. Ali sent Abdullah ibn Abbas to debate them before any fighting. Narrations differ on the numbers, but the best-known account says that some 2,000 returned with him and that the rest fought at Nahrawan.[20] The tradition drew a simple lesson from the episode. Argument comes first, and force comes last.

Two textual habits recur. The first is a literal, unconditional reading of Qur'an 5:44, "whoever does not judge by what God has revealed, they are the unbelievers". Classical commentators, including Ibn Abbas, read the verse as describing a lesser wrong rather than apostasy.[21] The second is the hadith describing people whose recitation "does not pass their throats" and who "kill Muslims and spare idol worshippers".[22]

FIGURE 2 **Three Phases, One Pattern, 657 CE to 2021**

Selected markers by phase



Source: DD compilation from the sources in the notes.[23, 24]

In the twentieth century the pattern acquired a modern theory. Sayyid Qutb's *Milestones* (1964) described Muslim societies as having returned to *jahiliyyah*, the ignorance that preceded Islam. Hasan al-Hudaybi's *Preachers, Not Judges* rejected that view from inside the same movement.[23] The 1979 siege of the Grand Mosque in Makkah under Juhayman al-Otaybi ended with 63 members of the group executed in January 1980.[24] The contemporary phase turned the ideas into operations, from the 1998 declaration of war to the TTP's formation in 2007 and ISKP's announcement in January 2015.

Three Boundaries This Brief Keeps

The administration

We assess observable conduct. That means centralised rule, little room for mediation, limits on dissent, and the reported hosting of armed groups.

The armed groups

The TTP, ISKP, and al-Qaeda use takfiri language openly. This is where the concept applies most directly.

Afghan society

The term is never applied to Afghans, who are the people most affected by the policies examined here.

The term is used as an analytical lens, not as a theological ruling. This brief does not pronounce on the faith of any person or group.

WHAT THE CONCEPT DOES NOT EXPLAIN

- **Other ideas.** Deobandi–Hanafi orthodoxy and Pashtun customary norms shape policy on their own terms.
- **Politics.** Rivalry between the Kandahari and Haqqani blocs, and the concentration of power in the Amir's office, drive many decisions (Sections 4 and 7).
- **Money.** Control of customs, contracts, and mining revenue shapes behaviour in ways that doctrine does not (Section 6).

FIGURE 3 **Pakistan Has Built the Doctrine, and Implementation Is the Gap**

Doctrinal and policy instruments, 2010 to 2024



The gap. The doctrine exists. Coordination, continuity, and reach into the information space are still missing.

Source: Tahir-ul-Qadri (2010); National Counter Terrorism Authority (NACTA); Paigham-e-Pakistan (2018); Ministry of Interior (2024).[25, 26, 27, 28]

Since July 2024, the state has officially referred to the TTP as *Fitna al-Khawarij*.[28] The vocabulary of this brief is therefore also the vocabulary of Pakistani policy, which makes analytical discipline more important, not less.

2 The Allegiance Rule

IN ONE LINE

> **Kabul fights the group that rejects its leader and shelters the groups that obey him.**

Allegiance, or *bay'ah*, binds several armed groups to the Taliban's leader. Osama bin Laden pledged allegiance to Mullah Omar in 1998, and Ayman al-Zawahiri renewed al-Qaeda's pledge to Akhtar Mansour in 2015 and to Haibatullah Akhundzada in 2016.[29,13] Within days of the August 2021 takeover, TTP chief Noor Wali Mehsud renewed his group's pledge.[12] None of these pledges has been publicly rejected.

FIGURE 4 **Who Pledges, and Who Is Pursued**

Armed groups by relationship to the Taliban's leader and by Kabul's response

GROUP	RELATIONSHIP TO THE AMIR	KABUL'S RESPONSE
TTP Tehreek-e-Taliban Pakistan	PLEDGED Allegiance renewed in Aug 2021	TOLERATED No campaign, and UN monitors judge Kabul "unlikely to confront" it
Al-Qaeda / AQIS Including al-Qaeda in the Indian Subcontinent (AQIS)	PLEDGED Pledged in 1998, 2015, and 2016, and never rejected	HOSTED Leader killed in Kabul in 2022, and status "unchanged"
TIP / ETIM Turkistan Islamic Party / East Turkistan Islamic Movement	NO PUBLIC PLEDGE Operates under Taliban sufferance	ACCOMMODATED Some members reported in police units and given ID papers
ISKP Islamic State Khorasan Province	DECLARES TAKFIR Calls the Taliban leadership apostate	FOUGHT Sustained military and intelligence campaign

THE ALLEGIANCE RULE — **Kabul's response depends less on what a group does to its neighbours than on whom it obeys.**

Source: UN Monitoring Team reports (2025–26); CTC Sentinel; BBC; Center for Strategic and International Studies (CSIS).[3, 30, 12, 11]

The test came on 31 July 2022, when a United States (US) strike killed Zawahiri on the balcony of a house in Kabul's Sherpur district. US officials linked the property to an aide of Interior Minister Sirajuddin Haqqani.[31] The Doha Agreement had committed the Taliban not to host members of al-Qaeda.[15] UN monitors still describe al-Qaeda's status in Afghanistan as unchanged and call the group a "service provider and multiplier" for others.[3]

ISKP is the mirror image. It rejects the Emirate, its borders, and its Hanafi jurisprudence, and it declares the Emirate's leaders apostate.[11] Against ISKP, Kabul has used its full capacity. Against groups that obey the Amir, it has not.

DD'S READING

The allegiance rule is the best single predictor of Kabul's behaviour towards armed groups, but it is not the only one. Some senior Taliban figures reportedly see the TTP as a liability,[3] while others fear that pressure on the group would push its fighters towards ISKP. The question for the coming year is whether liability starts to outweigh loyalty.



Illustration by Digital Debate

PART II

Governing

What the administration has built since 2021, whom it includes, and what it has cost Afghans.

3 From Insurgency to Government

IN ONE LINE

> The written promises of Doha on counter-terrorism and a political settlement were not kept.

The Doha Agreement of 29 February 2020 was meant to turn an insurgency into a counter-terrorism partner, and it front-loaded the concessions. The Republic released about 5,000 Taliban prisoners by mid-2020.[15] Of 108 released prisoners profiled in one study, 68 per cent had rejoined the fight within months.[32] In September 2021, the US Secretary of Defense and the Chairman of the Joint Chiefs of Staff told Congress that many had returned to the Taliban's ranks.[33]

TABLE 1 **Doha in Writing, and in Practice**

Commitment	What was signed in 2020	What followed
Counter-terrorism	Afghan soil not to be used by al-Qaeda or others to threaten the United States and its allies	Zawahiri killed in Kabul in 2022; UN reports al-Qaeda's status unchanged and more than 20 groups present
Intra-Afghan settlement	Negotiations with other Afghan parties on a political road map	Kabul taken by force in August 2021; political parties banned in August 2023
Prisoner release	Up to 5,000 Taliban for up to 1,000 others	Completed in 2020; many released fighters returned to the battlefield

Source: Doha Agreement; Foreign Policy; US congressional testimony; Voice of America (VOA); UN Monitoring Team.[15, 32, 33, 34, 3]

TABLE 2 **The First Emirate and the Second, Side by Side**

	1996–2001	2021–2026
Domestic revenue	Minimal, with no functioning national bureaucracy	19.8% of GDP in 2025 (World Bank)
Girls' secondary education	Banned	Banned, with 2.6 million girls affected since 2021 (UNICEF)
Elections and parties	None	None, and parties banned on 16 August 2023
Al-Qaeda	Hosted, after the 1998 pledge to Mullah Omar	Pledge to Akhundzada (2016) never rejected; leader killed in Kabul (2022)
Recognition	Pakistan, Saudi Arabia, and the United Arab Emirates (UAE)	Russia (July 2025); ambassadors accepted by China, the UAE, Uzbekistan, Pakistan, and others

Source: World Bank; UNICEF; VOA; BBC; International Crisis Group.[7, 1, 34, 13, 35]

4 One Centre, Four Networks

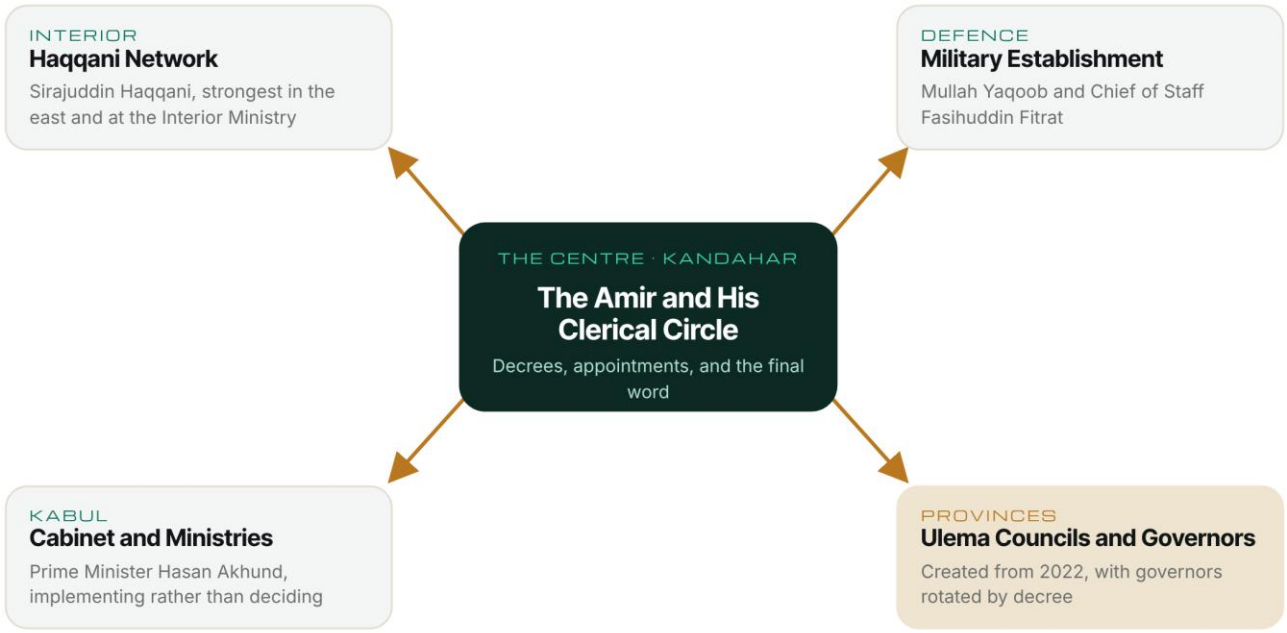
IN ONE LINE

> Power is concentrated in Kandahar, and the country's diversity is barely represented at the top.

Authority sits with the Amir in Kandahar, not with the cabinet in Kabul. The decision of 23 March 2022 shows this most clearly. Officials announced that girls' secondary schools would reopen, and within hours the decision was reversed from Kandahar.[36]

FIGURE 5 **One Centre and Four Networks**

Centres of authority in the Taliban administration



Source: DD analysis of open-source reporting and public decrees, 2021–2026.[37]

Below the centre, four networks compete. The Haqqani network is strongest at the Interior Ministry, and the defence establishment is built around Mullah Yaqoob, son of the movement's founder. The cabinet and ministries sit in Kabul, while provincial Ulema Councils, created from 2022, oversee doctrine locally. The Amir rotates governors and commanders often, and in 2026 alone decrees moved governors in Bamyan, Jawzjan, Parwan, Daykundi, Faryab, Baghlan, Khost, Badghis, and Badakhshan.[37] Rotation stops rivals from building local power bases. It also stops locally accountable institutions from taking root.

FIGURE 6 **Who Sat at the Table in September 2021**

Members of the interim cabinet by ethnicity, September 2021



Source: Composition of the interim cabinet announced on 7 September 2021, as widely reported; DD count.[37]

Control extends to speech. A Criminal Procedure Code adopted in January 2026 sets lashes and prison terms for "insulting" Taliban leaders and penalises failure to report "subversive" meetings. It also sorts people into social classes that face different punishments for the same offence.[38] Former Member of Parliament Mursal Nabizada was shot dead in Kabul in January 2023. In February 2023, Qudratullah Panjshiri, the movement's own former governor of Panjshir, was arrested on suspicion of links to ISKP, a sign of how far trust inside the movement has worn thin.[37]

The civil service has kept its size, with 405,863 staff in 2021 and 407,563 in 2023,[39] but its make-up has changed. UNICEF reports that women's share of the civil service fell from 21 per cent in 2023 to 17.7 per cent in 2025.[1] Women's labour-force participation stands at 24 per cent, against 89 per cent for men.[40]

5 Women, Schools, and the Information Order

IN ONE LINE

> **Restrictions on women and on the media are where doctrine shows most clearly in policy.**

2.6m	~100	24% vs 89%	175th
Girls denied secondary education since 2021	Edicts restricting women and girls still in force	Labour-force participation of women and men	Of 180 countries for press freedom in 2026
UNICEF[1]	UNDP[5]	UN WOMEN[40]	REPORTERS WITHOUT BORDERS (RSF)[41]

Afghanistan is the only country in the world where girls are barred from school beyond grade six. UNICEF counts more than 2.6 million girls denied secondary education since 2021, and the estimate of the UN Educational, Scientific and Cultural Organization (UNESCO) is 2.4 million.[1,42] The two figures rest on different methods, but both point the same way. Women have been barred from universities since December 2022. The 2024 Law on the Propagation of Virtue and the Prevention of Vice, with 35 articles in four chapters, turned years of decrees into statute.[43]

FIGURE 7 **Five Years of Restriction, One Step at a Time**

Major decrees and measures, September 2021 to January 2026

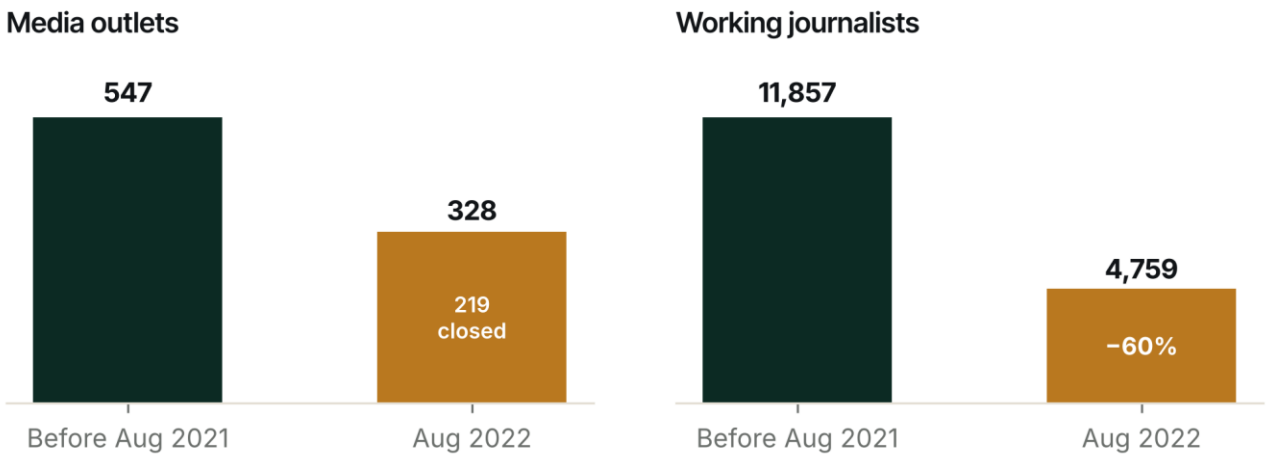
Sep 2021	**Girls' secondary schools (grades 7–12) closed**	Jan 2023	Women barred from private-university entrance exams
Feb 2022	Gender segregation ordered in universities	Apr 2023	Ban on working for NGOs extended to UN agencies
23 Mar 2022	**Reopening announced, then reversed from Kandahar within hours**	Jul 2023	Beauty salons closed, with tens of thousands of jobs lost
May 2022	Full face and body covering decreed	Aug 2024	**Vice and Virtue law gazetted, with 35 articles in four chapters**
Dec 2022	**Universities closed to women, and NGO work banned**	2025	Women's voices removed from radio in Kandahar
		Jan 2026	Women civil servants paid to stay home are terminated

Source: UN Women; Office of the UN High Commissioner for Human Rights (OHCHR); UN Assistance Mission in Afghanistan (UNAMA); Al Jazeera; Vice and Virtue law (2024).[36, 43]

The cost is not only to rights. UNICEF estimates that the restrictions cost the economy about US$84 million a year, and that Afghanistan could lose 20,000 women teachers and 5,400 women health workers by 2030.[1]

FIGURE 8 **Fewer Outlets, and Far Fewer Journalists**

Media outlets and working journalists, before and one year after August 2021



Source: Reporters Without Borders (2022).[44]

Within a year of the takeover, 219 of 547 media outlets had closed and the number of working journalists had fallen from 11,857 to 4,759.[44] Afghanistan ranked 175th of 180 countries in the 2026 World Press Freedom Index.[41] The 2024 law restricts images of living beings, and in 2025 women's voices were taken off the radio in Kandahar.[43, 41]

Madrassas as a State Project

Registered madrassas rose from about 5,000 in 2021 to more than 23,000 by September 2025, with some 3.65 million children enrolled. A decree of July 2023 called for 100,000 new madrassa teachers, and some public schools have been converted outright, among them the Abdul Hai Habibi High School in Khost, which had 6,000 students.[45] Religious education is not the concern. The concern is a system in which it becomes the only route open to boys while girls' secondary schools remain shut.

> DD'S READING
>
> This is the area where the evidence most closely tracks an absolute reading of religious authority. The reversal of March 2022 shows that some officials took a different view and were overruled. Those voices have not disappeared. Whether they regain ground in Kabul is worth watching more closely than any statement on the subject.

6 A Stronger State, a Poorer People

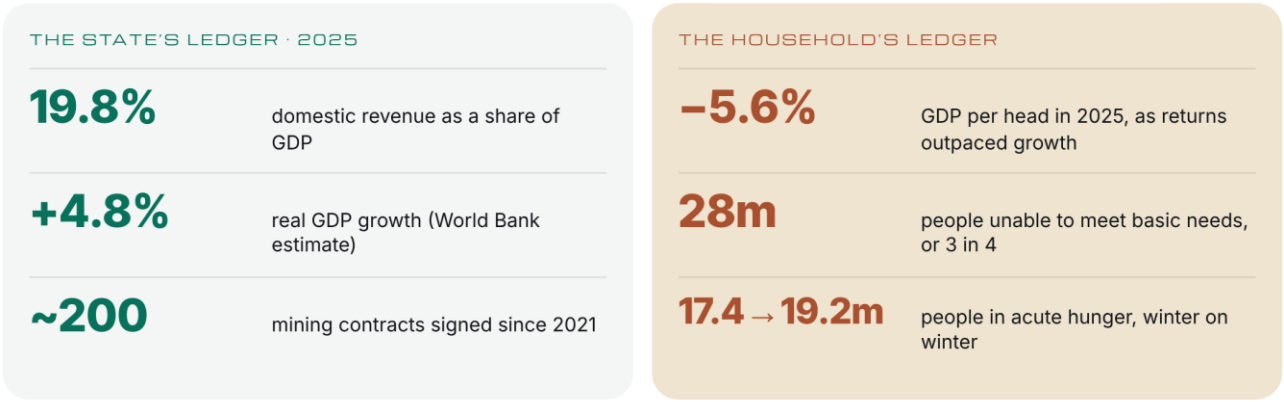
IN ONE LINE

> **The state collects more revenue than ever, while most households cannot meet their basic needs.**

The state's balance sheet and the people's have moved in opposite directions. The World Bank estimates growth of 4.8 per cent in 2025 and domestic revenue of 19.8 per cent of GDP. Yet GDP per head fell by 5.6 per cent as returnees outpaced growth, and the current-account deficit reached 36.1 per cent of GDP.[7]

FIGURE 9 **The State's Ledger and the Household's Ledger**

Selected fiscal and household indicators, 2025 and 2026



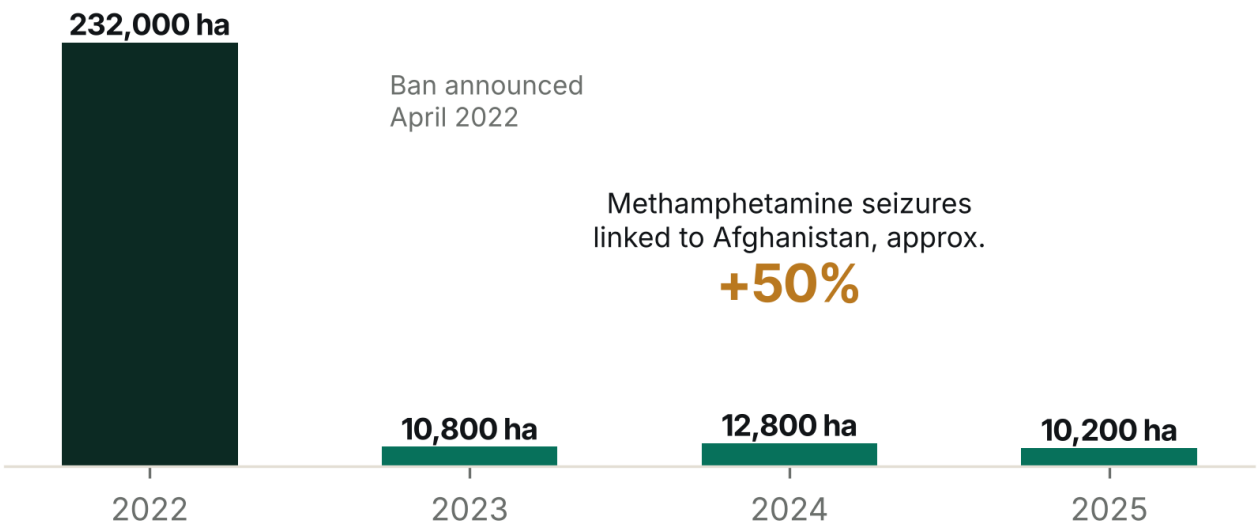
Source: World Bank (May 2026); UNDP (May 2026); WFP (Oct 2026).[7,5,6]

UNDP finds that three in four Afghans, about 28 million people, could not meet their basic needs in 2025.[5] WFP projects that 19.2 million people will face acute food insecurity this winter, up from 17.4 million a year earlier, and expects about four million cases of acute malnutrition in 2027.[6] The 2026 humanitarian plan seeks US$1.7 billion for 21.9 million people in need. By August it was 26 per cent funded.[9]

Returns add to the pressure. About 2.9 million Afghans came home in 2025 alone, most of them from Iran and Pakistan, and 92 per cent of recent returnees face subsistence insecurity.[5] The UN Refugee Agency (UNHCR) recorded more than one million returns from Pakistan in 2025.[46]

FIGURE 10 **Poppy Fell 95%, and the Trade Moved**

Area under opium poppy cultivation, hectares, 2022 to 2025



Source: UN Office on Drugs and Crime (UNODC), Afghanistan Opium Surveys, 2023 and 2025.[47, 48]

The ban of April 2022 cut poppy cultivation by 95 per cent.[47] By 2025, cultivation stood at 10,200 hectares, production had fallen by 32 per cent to about 296 tonnes, and farmers' income from opium had nearly halved to about US$134 million.[48] The ban is a real achievement on its own terms, and it shows that the leadership can enforce a nationwide policy when it chooses to. The trade, however, has shifted. UNODC reports that seizures of methamphetamine linked to Afghanistan rose by about 50 per cent, with production identified in districts of Farah province.[48, 49]

Mining, Where Money Meets Rivalry

By early 2025, the Ministry of Mines reported about 200 contracts signed since 2021. They include a 25-year oil deal in the Amu Darya basin with a Chinese firm, signed in January 2023, and the resumption of work at the Mes Aynak copper site.[50] In 2024 the ministry passed from a Haqqani-aligned minister to a Kandahar-aligned one. Contracts that bring no local benefit have turned grievances into clashes, most visibly in Badakhshan.

FIGURE 11 **Badakhshan, from Mine Disputes to Armed Resistance**

Selected events, February 2025 to August 2026

3 Feb 2025	Protest shooting in Awez leaves one young man dead
24–27 Oct 2025	Factional clashes in Shahr-e Buzurg
5–7 Jan 2026	Community mine clashes in Chah Ab leave 4 dead and 5 injured
10 May 2026	Mine clash in Shaki, as miners report illegal levies
18–21 May 2026	About 1,000 special forces deployed and mining suspended
22 Jun 2026	Authority centralised and a local commander arrested
17 Jul 2026	Yaftal-e Payeen district centre seized for hours, a first since 2021
Late Jul 2026	Governor removed, and AFF operations in Zebak
11–13 Aug 2026	Helicopter-supported clashes in Nusay
Aug 2026	Provincial leadership replaced

Source: DD event log; FDD's Long War Journal.[37, 10]

Local reporting also carries allegations about no-tender awards, inflated tonnage, and undisclosed shareholdings. DD has not been able to verify them and does not repeat the details here.

7 Resistance and the Northern Fault Line

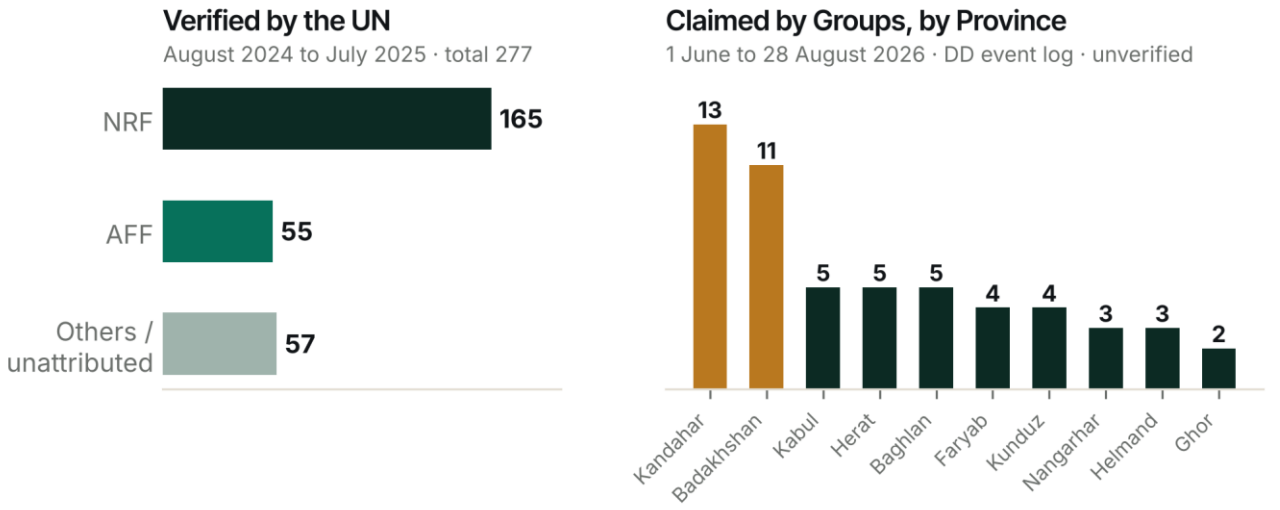
IN ONE LINE

> **Armed opposition is small but growing, and Badakhshan is where it matters most.**

The National Resistance Front (NRF) was founded on 17 August 2021 and lost the Panjshir valley within weeks. The Afghanistan Freedom Front (AFF) followed in March 2022. UN reporting verified 277 attacks by armed opposition groups between August 2024 and July 2025, of which 165 were by the NRF and 55 by the AFF.[51] The groups' own claims run far higher, so this brief keeps claimed and verified figures apart.

FIGURE 12 **Verified Attacks, and Where Claims Cluster**

Attacks by armed opposition groups, verified and claimed



Source: European Union Agency for Asylum (EUAA), citing UN Secretary-General reporting; DD event log (claims, unverified).[51, 37]

July 2026 marked a change. On 17 July a new group, Sepahiyan-e Mihan, seized the district centre of Yaftal-e Payeen in Badakhshan and held it for several hours. It was the first district centre the Taliban had lost since 2021.[10] The AFF launched operations in Zebak days later, and on 1 August the Afghan United Front, led by former General Sami Sadat, claimed its first attack, in Kandahar.[52]

Badakhshan matters beyond its own borders. It touches Tajikistan and, through the Wakhan corridor, China. UN monitors report that fighters of the Turkistan Islamic Party, also known as the East Turkistan Islamic Movement (TIP/ETIM), are concentrated there.[30] The province hosts disputed gold mines, and it is where cross-border attacks into Tajikistan began in late 2025.[53]



Illustration by Digital Debate

PART III

Security and the Region

The militant ecosystem, the cost to Pakistan, and how the neighbourhood has adjusted.

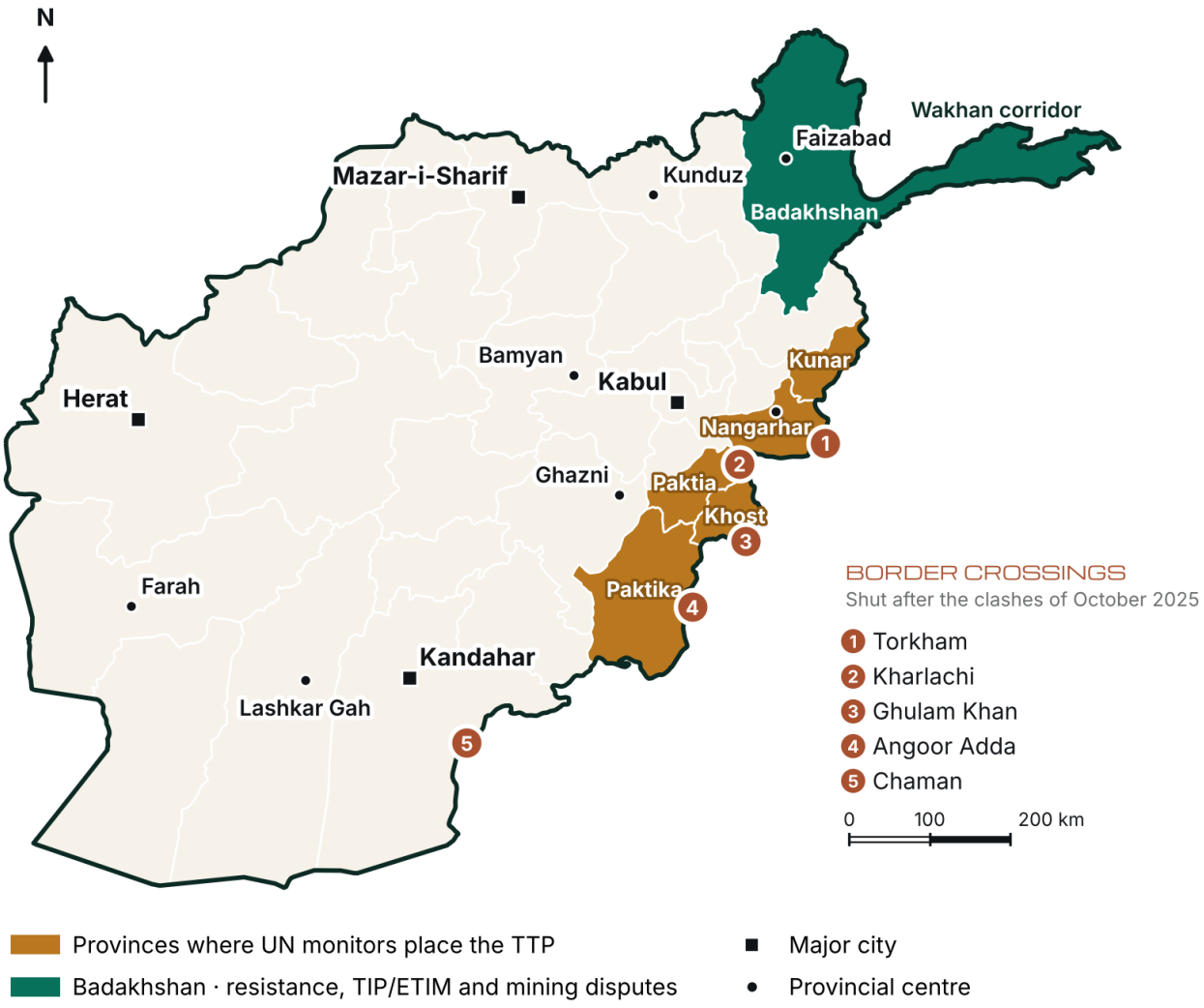
8 The Militant Ecosystem on Afghan Soil

IN ONE LINE

> Afghanistan hosts more than 20 armed groups, and the costs reach China, Russia, and Central Asia as well as Pakistan.

FIGURE 13 **Where the Pressure Points Sit in Afghanistan**

Provinces, major cities, and border crossings

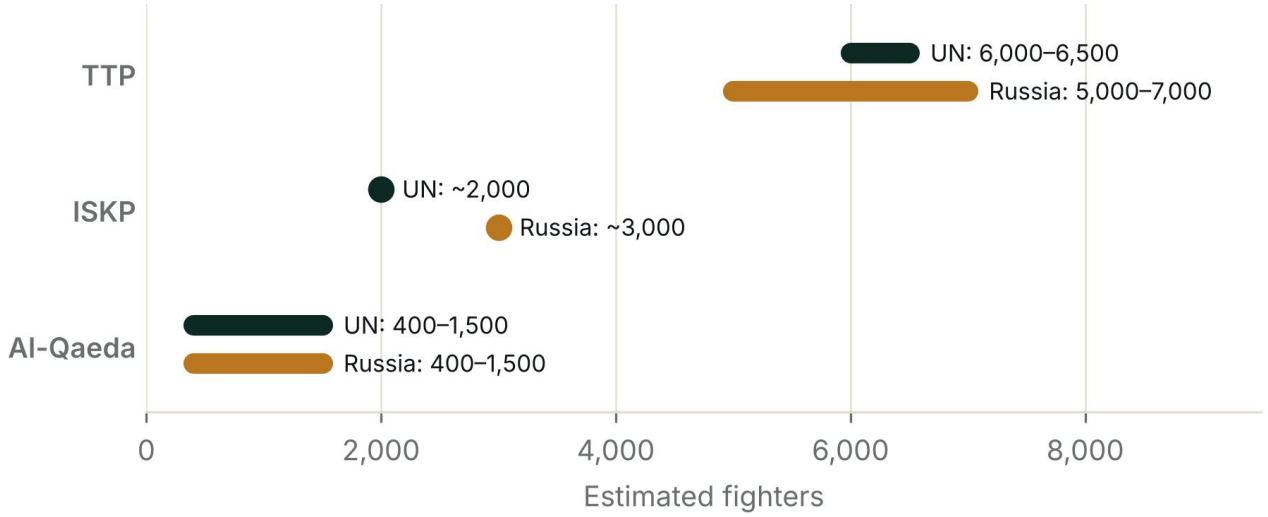


Source: Boundaries from Natural Earth (public domain). Overlays from the UN Monitoring Team and DD analysis. Boundaries are illustrative and imply no position on any border.[3]

UN monitors count more than 20 armed groups in Afghanistan.[3] Russia's foreign ministry put the total at 20,000–23,000 fighters in February 2026, more than half of them foreign.[54] The Taliban reject both assessments. Because the estimates rest on different methods, this brief reads them as ranges.

FIGURE 14 **How Many Fighters, According to Whom**

Estimated number of fighters by group, UN and Russian estimates



Source: UN Monitoring Team (2025); Russian Ministry of Foreign Affairs (Feb 2026).[55,3,54]

TABLE 3 **The Groups in Brief**

Group	Footprint	What UN monitors report
TTP	Khost, Kunar, Nangarhar, Paktika, and Paktia	About 6,000 fighters; logistical, operational, and financial support from the Taliban, who are judged "unlikely to confront" the group
Al-Qaeda and al-Qaeda in the Indian Subcontinent (AQIS)	Southern and eastern provinces, with leaders reported in Kabul	Status unchanged since 2021; a "service provider and multiplier" for other groups
ISKP	East and north, with online recruitment in Central Asia	About 2,000 fighters; the Taliban's main armed enemy
TIP and ETIM	Badakhshan and the Wakhan corridor	Growing concentration; some members reported in police units and issued identity documents
Ittihad-ul-Mujahideen Pakistan	Border areas	Emerged in April 2025; about 500 fighters and more than 150 claimed attacks in Pakistan

Source: UN Monitoring Team reports, February 2025 to February 2026.[56, 3, 30]

Spillover beyond Pakistan

On 26 November 2025, a drone launched from across the border killed three Chinese workers at a gold-mining site in Tajikistan, and four days later two more Chinese workers were shot dead. Tajik officials traced the attacks to Badakhshan.[53] ISKP's reach extends further. The March 2024 attack on Crocus City Hall near Moscow killed more than 140 people, and in February 2026 an Islamic State affiliate bombed a Shia mosque in Islamabad, killing at least 31.[57] Inside Afghanistan, ISKP has repeatedly targeted Hazaras. The attack on the Kaaj education centre in Kabul in September 2022 killed 53 people, most of them young women.[58]

The tools are getting cheaper. Both the Taliban's forces and the TTP have turned to armed drones since 2025.[59] The US estimated that about US$7 billion of US-funded military equipment remained in Afghanistan after the 2021 withdrawal, and UN monitors report that the TTP has acquired advanced weapons and equipment there.[60, 56]

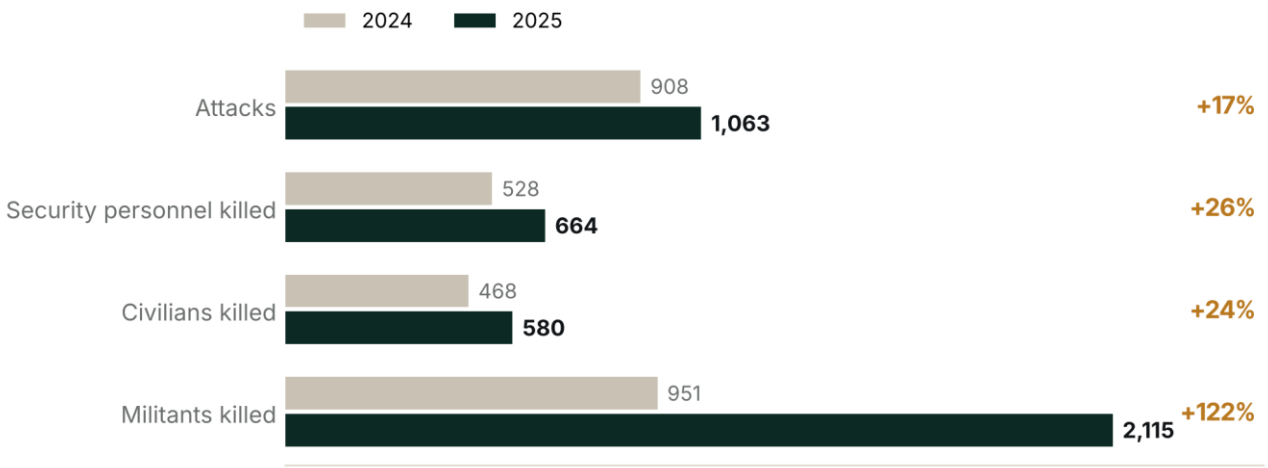
9 The Cost to Pakistan

IN ONE LINE

> 2025 was Pakistan's deadliest year in a decade, and diplomacy has not reversed the trend.

FIGURE 15 **2025, the Deadliest Year in a Decade**

Attacks and deaths in Pakistan, 2024 and 2025



Source: Pakistan Institute for Conflict and Security Studies (PICSS), annual assessment for 2025.[2]

PICSS recorded 1,063 attacks in 2025, an increase of 17 per cent. Combat-related deaths rose by 73 per cent to 3,387, including 664 security personnel and 580 civilians.[2] The Pak Institute for Peace Studies (PIPS), using a narrower definition, counted 699 terrorist attacks, up 34 per cent.[61] Both series point the same way. UN monitors had already logged more than 600 TTP attacks in the second half of 2024 alone.[56]

TABLE 4 **Selected Attacks, 2025–2026**

Date	Attack	Toll
11 Nov 2025	Suicide bombing outside the district court in G-11, Islamabad	12 killed, 36 injured
6 Feb 2026	Suicide bombing at a Shia mosque in Tarlai, Islamabad, claimed by an Islamic State affiliate	At least 31 killed
9 May 2026	Vehicle bomb at the Fateh Khel police post, Bannu	15 police killed

Source: Dawn; Al Jazeera; Associated Press of Pakistan.[62, 57, 63]

UN monitors report that most suicide bombers in Pakistan were said to be Afghan nationals, and Pakistani officials put the share of Afghans among attackers higher still.[3] Kabul rejects these accounts, and the figures have not been verified case by case in public. This brief therefore presents them as Pakistan's assessment.

Diplomacy Came First

FIGURE 16 **Before the Pressure, Pakistan's Engagement with Kabul since 2021**

Pakistan's engagements with the Taliban administration by type, August 2021 to 2025

4 Foreign Minister Visits	**2** Missions by the Defence Minister or Director-General, Inter-Services Intelligence (ISI)	**5** Special Representative Visits
5 Secretary-Level Meetings	**1** National Security Adviser Visit	**8** Joint Coordination Committee Meetings
225 Border Flag Meetings	**836** Protest Notes	**13** Formal Demarches

Source: Figures provided to the DD Research Desk by Pakistani officials.[16]

The escalation came in stages. Pakistan's crossings at Torkham, Chaman, Kharlachi, Angoor Adda, and Ghulam Khan closed in October 2025 after clashes. A ceasefire was agreed in Doha on 19 October under Qatari and Turkish mediation.[14] Talks in Istanbul failed on 28 October and again on 6–7 November.[64] Fighting resumed in late February 2026, with Pakistani strikes reaching Kabul, Kandahar, and Bagram, and UNHCR estimated that more than 115,000 people in Afghanistan and 3,000 in Pakistan were displaced.[65]

FIGURE 17 **From Ceasefire to Open Conflict in Five Months**

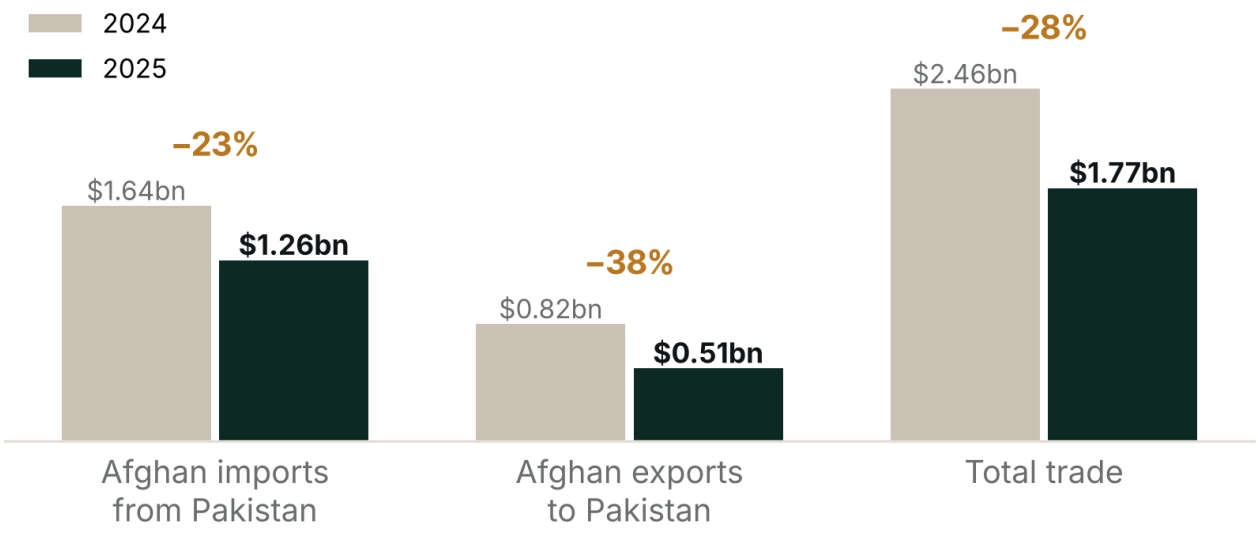
Selected events, October 2025 to May 2026

Oct 2025	Border clashes; five crossings closed
19 Oct 2025	Ceasefire agreed in Doha (Qatar, Türkiye)
28 Oct 2025	Istanbul round ends without agreement
6–7 Nov 2025	Final round, in which Kabul agrees in the room but will not sign
11 Nov 2025	Suicide bombing at Islamabad district court
6 Feb 2026	Bombing at a Shia mosque in Islamabad
Late Feb–Mar 2026	Strikes and border fighting displace about 118,000 people
9 May 2026	Attack on the Fateh Khel police post in Bannu kills 15 police

Source: DD compilation from Geo News, RFE/RL, Dawn, Al Jazeera, UNHCR, and APP.[14,64,62,57,65,63]

FIGURE 18 **Trade Lost about US$695 Million in a Year**

Bilateral trade, US$ billion, 2024 and 2025



Source: Ministry of Industry and Commerce of the de facto authorities, January 2026; DD calculation.[4]

Bilateral trade fell from US$2.46 billion in 2024 to US$1.77 billion in 2025, a drop of about 28 per cent.[4] Traders on both sides paid the price, and Afghan importers moved towards Iran and Central Asia, along routes that are longer and costlier. Under Pakistan's repatriation plan, launched in October 2023, more than one million Afghans returned from Pakistan in 2025 alone.[46]

What Is Recorded, and What Is Attributed

Pakistan's costs are measurable, and responsibility for them is the contested part. UN monitors report that the Taliban give the TTP logistical, operational, and financial support.[56] In April 2026, UN human-rights experts questioned whether there was credible evidence linking specific attacks to Afghan soil. Pakistan rejected that view and cited successive UN, Russian, and regional assessments.[17] This brief separates what is recorded, such as attacks, deaths, and closures, from what is attributed, namely Kabul's degree of responsibility, and treats the second as an assessment.

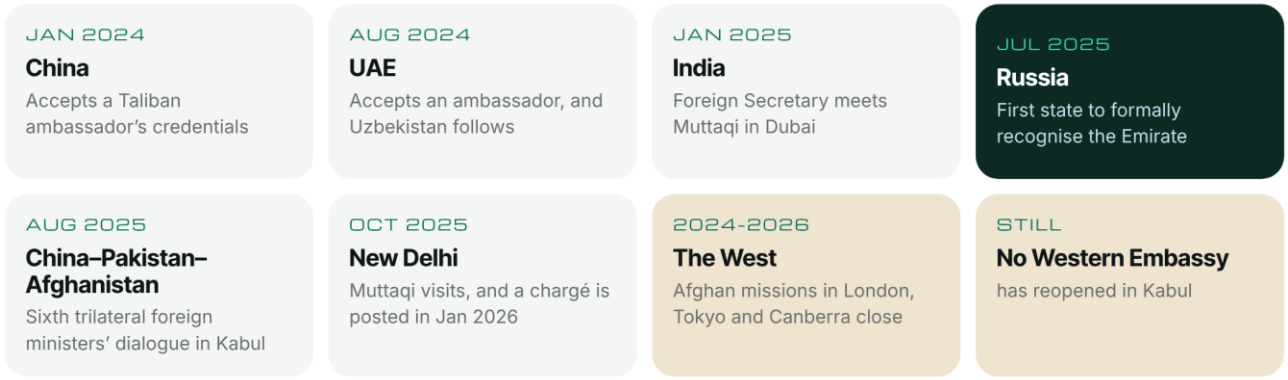
10 A Region That Engages without Trusting

IN ONE LINE

Neighbours deal with Kabul because they must, not because they trust it.

FIGURE 19 **Engagement Has Widened, but Recognition Has Not**

Selected diplomatic steps, 2024 to 2026



Source: International Crisis Group; Ministry of External Affairs of India; Hasht-e Subh.[35,66,67]

Russia became the first state to recognise the Islamic Emirate formally, in July 2025.[35] China, the UAE, Uzbekistan, and Pakistan have accepted Taliban-appointed ambassadors without formal recognition. India has moved step by step, from a meeting in Dubai in January 2025 to a visit by Amir Khan Muttaqi to New Delhi in October 2025.[66] Meanwhile, several Afghan embassies in Western capitals that were run by diplomats of the former Republic have closed.[67] No Western embassy has reopened in Kabul, and about half of Da Afghanistan Bank's frozen reserves held in the United States now sit in a Swiss-based fund.[68]

Regional states engage because geography leaves them little choice, given shared borders, trade, water, migration, and militancy. Qatar hosts the Taliban's political office and mediates. China, Pakistan, and the Taliban held their sixth trilateral foreign ministers' dialogue in Kabul in August 2025. The large connectivity projects, from the Central Asia–South Asia power project (CASA-1000) to the Turkmenistan–Afghanistan–Pakistan–India (TAPI) gas pipeline and the Trans-Afghan Railway, all depend on a security the region does not yet have.



Illustration by Digital Debate

PART IV

What Happens Next

How the coming year could unfold, what to watch, and what each audience can do.

11 The Next 12 Months

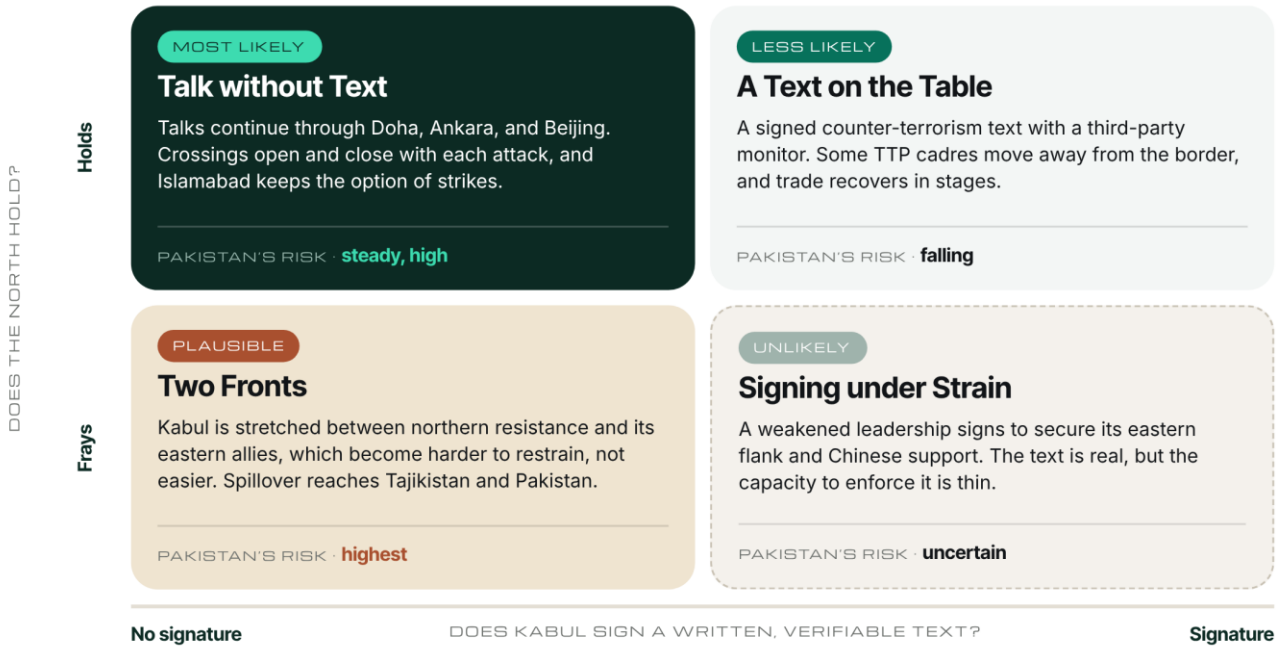
IN ONE LINE

> Two questions will shape the year. Will Kabul sign, and will the north hold?

DD does not forecast a single outcome. Instead, we frame the year to October 2027 around the two questions that matter most for Pakistan and the region. The first is whether Kabul will commit to a written, verifiable text. The second is whether its control of the north will hold. Taken together, the two questions give four possible worlds, each with a different set of risks.

FIGURE 20 **Four Worlds to October 2027**

Two questions, four outcomes, October 2026 to October 2027

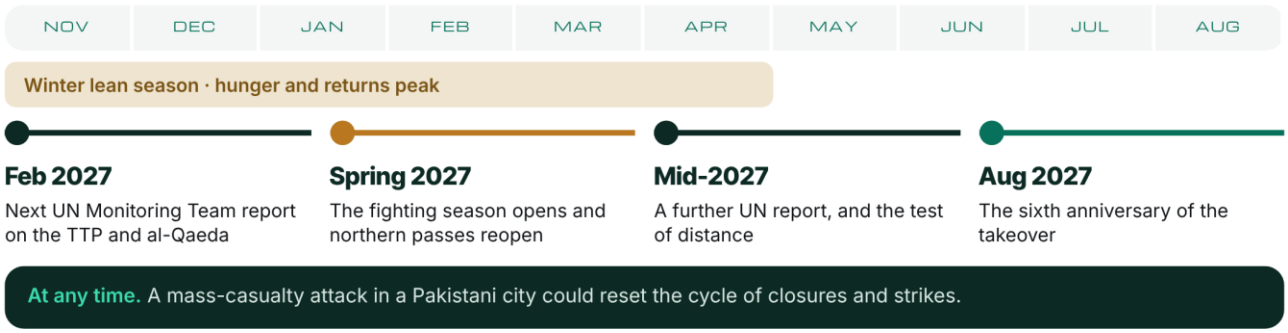


Source: DD Research Desk assessment, October 2026.

The two axes interact. A weaker grip on the north makes allies such as the TTP more valuable to Kandahar, not less, which is why “Two fronts” is the most dangerous world for Pakistan. A weaker grip could also, in time, push a stretched leadership to secure its eastern flank on paper, which is the logic behind “Signing under strain”. That outcome is unlikely, but it should not be dismissed.

FIGURE 21 **The Year in Five Checkpoints**

Checkpoints, November 2026 to August 2027



Source: DD Research Desk; WFP; UN Monitoring Team reporting cycle.[6, 3]

DD'S READING

Talk without text is the default. Neither side can afford a full break, nor will neither pay the price of a full deal. Expect cycles of closure and reopening, and talks that keep a channel open without closing the gap.

A written deal in the coming year is unlikely, but not impossible. The allegiance rule makes signing costly for the Amir. That cost could change if the TTP becomes a threat to Kandahar's own authority, or if China ties its investment to verification.

The north is the wild card. A second district centre lost in Badakhshan, or new attacks across the Tajik border, would matter more than any statement from Kabul.

THREE INDICATORS TO WATCH OVER THE NEXT 6-12 MONTHS · STATUS AS OF OCTOBER 2026

01 NO TEXT

Paper

Will Kabul sign a counter-terrorism text with Islamabad that names a third-party verifier? Watch the Doha and Istanbul channels and any China-led trilateral meeting.

02 NO VERIFIED MOVE

Distance

Will UN monitors report a verified move of TTP leaders and fighters away from Khost, Kunar, Nangarhar, Paktika, and Paktia? Watch the reports due in 2027.

03 PRESSURE RISING

The north

Will resistance, TIP/ETIM activity, and mining disputes converge in Badakhshan? Watch for district centres lost, incidents on the Tajik border, and suspended mines.

12 Options for Each Audience

IN ONE LINE

> These options are offered for consideration. No single measure will change Kabul's conduct on its own.

For Pakistan

1. **Make paper the price of full reopening.** Link the full reopening of the crossings to a written, verifiable text, while keeping humanitarian goods and perishables moving so that traders on both sides do not bear the main cost.
2. **Put verification in third-party hands.** Ask Qatar and Türkiye, which mediated the ceasefire of October 2025, to host a small joint monitoring cell, and invite China, whose own nationals have been killed in Tajikistan.
3. **Keep the tracks apart.** Handle security, trade, and refugees in separate channels, so that progress on one does not wait for the others.
4. **Publish more of the evidence.** Case files shared with a trusted third party would strengthen Pakistan's position abroad, where attribution is still questioned.
5. **Take the argument to the scholars.** Build on Paigham-e-Pakistan with structured exchanges with Afghan ulema, including Deobandi seminaries on both sides, on the limits of takfir and of allegiance.
6. **Repatriate by the book.** Document every return, coordinate with UNHCR, and keep a humanitarian minimum, so that repatriation is not seen as a tool of pressure.

For China, Russia, and Central Asia

1. Make mining and connectivity investment conditional on verifiable action against TIP/ETIM and ISKP.
2. Share data on the cross-border movement of fighters and drones through the existing channels of the Shanghai Cooperation Organisation (SCO).

For the International Community

1. Close the gap in the 2026 humanitarian plan, which is 26 per cent funded, and treat hunger as a security risk as well as a humanitarian one.
2. Fund girls' learning through community and online channels outside the administration's control.
3. Protect the budget and access of the UN Monitoring Team, whose reports are the closest thing the region has to a shared set of facts.
4. Tie any easing of sanctions or release of reserves to named, verifiable steps.
5. Help Pakistan and Iran carry the cost of hosting and receiving returnees.

For Research and Track II

1. Build an open dataset of cross-border attacks that separates claimed, attributed, and verified incidents.
2. Track mining contracts and revenue as an early warning of factional conflict.
3. Hold recorded and published dialogues among scholars on takfir and authority, so that the argument takes place in public.

13 Conclusion

Five years on, the Taliban administration has shown that it can govern a territory. It has not shown that it can be a reliable neighbour, and the gap between the two is a matter of allegiance as much as capacity.

Kabul fights those who reject its leader and shelters those who obey him, which is why its assurances arrive in conversation and not in writing. Kharjeeyat helps to explain the worldview behind this, with its rigid readings, little tolerance for mediation, and a widening circle of enemies. The story is also one of factions, kinship, and money, and any response that sees only doctrine will miss half of it.

For Pakistan and the region, the practical lesson is to stop asking whether Kabul means what it says and to start asking what it will sign and allow others to verify and enforce. Silence is not a strategy, and force alone will not produce a settlement. An assurance is not a guarantee until it is written down.

Annex A · Method and Limits

Scope. This brief covers Afghanistan from 15 August 2021 to 25 October 2026, with a focus on the consequences for Pakistan and the region.

Sources. We rely first on primary and institutional sources, namely the reports of the UN Security Council Monitoring Team, UN agencies (UNICEF, UNESCO, UNDP, WFP, OCHA, UNHCR, UNODC, and UN Women), the World Bank, and the official statements of the governments concerned. We then draw on independent research institutes (PICSS, PIPS, CSIS, the Combating Terrorism Center at West Point, and FDD's Long War Journal) and on established media. DD's own sources are the Research Desk's interviews and conversations with scholars, officials, and analysts, and an open-source event log that the Desk maintains.

Claimed and verified. Group claims, government allegations, and independently verified figures are kept separate throughout. Where they differ, we show both and say which is which.

Contested figures. Where sources disagree, as on the number of girls out of school, we report the range and name the sources.

Annex B · Glossary and Abbreviations

Amir al-Mu'minin	Commander of the Faithful, the title held by the Taliban's supreme leader.
Bay'ah	An oath of allegiance to a leader, binding in religious as well as political terms.
Fitna al-Khawarij	The Government of Pakistan's official term for the TTP since July 2024.
Kharjeeyat	In this brief, a pattern of rigid interpretation, rejection of mediation, and widening takfir.
Khurooj	Armed rebellion against a Muslim ruler.
Takfir	The judgement that a Muslim has left the faith.
PVPV law	The 2024 Law on the Propagation of Virtue and the Prevention of Vice.

Abbreviations

AFF	Afghanistan Freedom Front
AQIS	Al-Qaeda in the Indian Subcontinent
CASA-1000	Central Asia–South Asia power project
CSIS	Center for Strategic and International Studies
DD	Digital Debate
EUAA	European Union Agency for Asylum
GDP	Gross domestic product
ISI	Inter-Services Intelligence
ISKP	Islamic State Khorasan Province
NACTA	National Counter Terrorism Authority
NRF	National Resistance Front
OCHA	UN Office for the Coordination of Humanitarian Affairs
OHCHR	Office of the UN High Commissioner for Human Rights
PICSS	Pakistan Institute for Conflict and Security Studies
PIPS	Pak Institute for Peace Studies
PVPV	Propagation of Virtue and Prevention of Vice

RSF	Reporters Without Borders
SCO	Shanghai Cooperation Organisation
TAPI	Turkmenistan–Afghanistan–Pakistan–India gas pipeline
TIP/ETIM	Turkistan Islamic Party/East Turkistan Islamic Movement
TTP	Tehreek-e-Taliban Pakistan
UAE	United Arab Emirates
UN	United Nations
UNAMA	UN Assistance Mission in Afghanistan
UNDP	UN Development Programme
UNESCO	UN Educational, Scientific and Cultural Organization
UNHCR	UN Refugee Agency
UNICEF	UN Children’s Fund
UNODC	UN Office on Drugs and Crime
US	United States
VOA	Voice of America
WFP	World Food Programme

Endnotes

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