Absence as Policy
Afghanistan a Quarter Century After 9/11

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One week in Kabul

On 7 September 2026 an agreement was signed in Kabul that in ordinary circumstances would have been trade press news at most. The Saudi Delta group agreed with the Taliban Ministry of Mines and Petroleum to explore for oil and gas in the west of the country, in Herat province, on the border with Iran and Turkmenistan. The agreement also covers a study of whether Afghan gas could be used locally, in plants and power stations around Herat, and an assessment of the commercial case for a seven hundred kilometre pipeline running across the country from west to south east, as far as the Pakistani border. The company named it the CentGas Corridor of Prosperity. [1]

The news travelled further for a different reason. Zalmay Khalilzad was in the room, the American diplomat of Afghan origin who from 2018 to 2021 led Washington’s talks with the Taliban and in February 2020 signed the Doha agreement that opened the way to the withdrawal of American forces from Afghanistan. [2] The man who put his name to the American exit became a witness to the Saudi entry.

Five days later, on 12 September, the State Department warned American companies against doing business in Afghanistan, recalling the sanctions covering the Taliban, their leaders and entities associated with them. The Treasury noted that sanctions may also reach firms outside the United States if they enter into certain transactions with the Taliban. On Khalilzad’s presence Washington confined itself to a brief statement that he is not an employee of the United States government and does not act on its behalf. [3]

Those five days expose the paradox of American policy towards Afghanistan a quarter of a century after the attacks of 11 September. The United States has no embassy and no troops in Kabul today, and since April 2025 it has funded neither development nor humanitarian assistance in the country. It has retained, however, an instrument whose reach extends far beyond its physical presence. An American bank will not process a transaction for a Taliban ministry, a United States company exposes itself to sanctions, and a firm from another country may be exposed as well where its transactions involve restricted persons or entities and fall outside the available exemptions. [3] Washington has left Afghanistan, yet it can still shape the conduct of those trying to occupy the space it vacated.

This is precisely what American absence in Afghanistan amounts to. Of the wide set of instruments Washington deployed for two decades, the military, diplomacy, aid and economic programmes are gone, and what remains is above all the force of sanctions and of the American financial system. This is no longer a temporary condition following a troop withdrawal, but a model of policy sustained by successive administrations. The question on the anniversary of 11 September is therefore a simple one. Are sanctions alone enough? Will a Saudi, Chinese or Russian businessman who does not settle accounts in dollars and does not need access to the American market genuinely be deterred by them? The agreement of 7 September makes it possible to test this against a concrete case.

Two round anniversaries also fell in 2026. In August it was five years since the Taliban returned to power, and Kabul used the moment for a diplomatic offensive directed at Washington, Beijing, Moscow and the states of the region, whose most visible element was a series of August interviews given by the head of Taliban diplomacy to American, British and Japanese media. A month later came the twenty fifth anniversary of the attacks of 11 September, in which nearly three thousand people died and which set in motion two decades of international presence in Afghanistan and expenditure counted in trillions of dollars. In Western capitals it was above all an occasion to remember the past. The paradox of this anniversary, however, lies elsewhere. Afghanistan is ceasing to be isolated and is returning to regional economic and diplomatic circulation, only now without the West. Iran has opened the port of Chabahar to it, Uzbekistan is building rail connections, Russia has recognised the Taliban government, China maintains full relations, and Gulf capital has returned with an energy project conceived before the American intervention. The West treated its history with Afghanistan as closed at roughly the moment when others began to continue it.

The difference does not lie in the newcomers arriving without historical baggage. Russia fought a ten year war there that ended with withdrawal in 1989, and it has nonetheless become the first and so far the only state to recognise the Taliban government. The difference lies in whether that past weighs on today's decision making actor. The war was fought by the Soviet Union, and its outcome does not burden Russian policy today to the degree that the 2021 withdrawal remains the lived experience of current Western institutions, administrations and alliances. China fought no war in Afghanistan at all. In the West, by contrast, the decisions rest with the same institutions and alliances that conducted that war and withdrew from it without achieving their stated aims, and that must now define their attitude towards those who took power in Kabul after them. What is at stake is therefore not memory as such, but the fact that the Afghan experience is written into the identity and credibility of today's players. A quarter of a century after 11 September this difference matters more than any argument about sanctions or about recognising the authorities in Kabul.

What Kabul wanted and why it was refused

For several weeks the Taliban have been fairly clear about what they expect from the United States. In an August interview with The New York Times the acting foreign minister Amir Khan Muttaqi declared the chapter of war closed and proposed rebuilding relations based on mutual respect. Behind that general formula lay a specific offer. Kabul wanted the American embassy reopened, a diplomatic presence restored and American investment in Afghan deposits, dams and roads. At the same time Muttaqi ruled out the return of American troops, stressing that Afghans would not accept a renewed foreign military presence on their territory. [4]

He had said much the same earlier to the Financial Times. Kabul is ready to accept American investment in mining, infrastructure, agriculture and trade, but all military and civilian facilities in the country, including the Bagram air base, remain Afghan property. [5] In late August, speaking to the Kyodo agency, Muttaqi added that formal recognition of the Taliban government by the United States could wait. [6] What Kabul sought first was therefore sanctions relief, the unfreezing of Afghan assets held abroad and an opening towards economic relations. [7]

Washington refused. In a statement provided to The New York Times the State Department ruled out normalisation at this stage, pointing to security concerns and to counterterrorism commitments the Taliban have not fulfilled. [8] Matters left unresolved after the American withdrawal also remain open. They concern Bagram, the military equipment left behind in Afghanistan and the fate of a detained American citizen whose detention the Taliban do not confirm. [9] To this must be added relations with Pakistan and the experience of the Afghan extractive sector over the previous two decades, disappointing enough that the wealth of the deposits is not in itself an argument for return. The offer of access to raw materials was not sufficient to push any of these questions into the background.

It is worth looking at Syria here, because towards the authorities in Damascus the same Washington chose an almost opposite course at roughly the same time. Ahmed al-Sharaa, the current president of Syria, headed until a few years ago Hayat Tahrir al-Sham, an Islamist group descended from the Syrian branch of al-Qaeda, and the United States offered a multimillion dollar reward for information leading to his capture. In December 2024 his forces overthrew Bashar al-Assad. Less than a year later the United Nations Security Council lifted the sanctions imposed on him, and a month after that the American Congress repealed the Caesar Act, which since 2019 had threatened sanctions against entities conducting significant business with the Syrian authorities. The State Department revoked the designation of Hayat Tahrir al-Sham as a foreign terrorist organisation as early as July 2025, and in August 2026 it removed Syria from the list of state sponsors of terrorism and lifted the separate designation of the group as a global terrorist organisation. [10]

This was not an American decision alone. The European Union lifted its broad economic sanctions on Syria in May 2025, retaining security related measures and individual listings, and on 9 January 2026 Ursula von der Leyen and António Costa travelled to Damascus, met al-Sharaa and announced a new chapter in bilateral relations. It covers a political partnership supporting internal change and Syria's return to the region, trade and economic cooperation, and a financial package of around 620 million euro for 2026 and 2027. [11] The President of the Commission spoke on that occasion of steps taken by the transitional authorities and of reforms the Union intends to support.

None of this was a reward for democratisation. Congress obliged the president to report periodically on Syrian progress in countering the Islamic State, protecting religious and ethnic minorities and reducing the threat to Israel. [12] All these conditions concern security. None refers to investment, trade or access to resources. Nor is the shift in American policy easily explained by improved standards of governance. Elections to the Syrian parliament were not held by universal suffrage but indirectly, through electoral colleges, and the president appointed a third of the chamber himself. In the north east of the country no vote took place at all, and in Suwayda province it was postponed indefinitely. [13]

The comparison between Syria and Afghanistan therefore leads further than Washington's inconsistency alone. Towards Damascus the United States saw an opportunity to pursue concrete security interests and in exchange began dismantling the system of isolation, while the European Union concluded that talking to a government descended from armed Islamism is not a form of legitimising it but a way of pursuing its own interests. Kabul offered chiefly investment and access to raw materials, which proved insufficient. What proved decisive was the current usefulness of the authorities in Damascus for security interests, rather than the past of either government. Al-Sharaa's own past did not close the door, because he had something to offer that Washington wanted. What closes the door to the Taliban is not the memory of 11 September but the absence of an equally useful offer.

The differences between the two cases are obvious and should be kept in mind. In Syria there is at least a declared transitional process and authorities seeking to make it credible. The Taliban are conducting no such process and maintain their ban on education and employment for women. These differences do not, however, dispose of the underlying question. It is not whether Afghanistan deserves the same treatment as Syria, but whether the West is capable of defining its own interest towards a state whose government it does not accept.

Afghanistan returns to the region

The American withdrawal did not leave Afghanistan isolated, and over the past year its economic reorientation towards Iran and Central Asia has visibly accelerated. The immediate trigger was the deterioration of relations with Pakistan. After border fighting in October 2025 Islamabad closed the main crossings, and Kabul began shifting trade westwards. As early as November a spokesman for the Afghan ministry of commerce was reporting that six month trade with Iran had reached 1.6 billion dollars against 1.1 billion with Pakistan, and deputy prime minister Abdul Ghani Baradar gave traders three months to close Pakistani contracts and move to other routes. [14] In February 2026 Pakistani aircraft struck targets deep inside Afghanistan, after which the United Nations recorded at least 289 civilians killed and injured, and the Torkham crossing was later opened only to Afghans returning from Pakistan, with no movement of goods. [15] For a landlocked country this meant losing its main route to the ports of Karachi and Qasim, and an emergency response to a crisis became a durable change in the geography of Afghan trade.

The second direction is Central Asia. Afghan imports from the five republics there rose by 43 per cent in 2025, to 2.4 billion dollars, and exports by 77 per cent, while a planned railway across Afghanistan is to connect Uzbekistan with Pakistan and the southern ports. In June 2026 the president of Uzbekistan again confirmed the importance of the project, and a Taliban delegation took part in the same economic forum in Tashkent. [16]

What is at work here matters more than a change in Afghan trade routes. Russia remains the only state to have formally recognised the Taliban government. China, Kazakhstan and Uzbekistan have not done so, yet they maintain diplomatic relations with Kabul and develop economic cooperation. [17] Formal recognition is therefore ceasing to be a condition of doing business. It is possible to trade, build infrastructure and conclude extraction agreements while leaving the status of the authorities unresolved.

This undermines one of the mechanisms on which the West has long based its policy towards unrecognised governments, since political isolation was meant to entail economic isolation. Afghanistan shows that the two can be separated, and the more partners a given government finds willing to act in this way, the less non recognition means.

Seen in this light the September agreement with the Saudi Delta group carries greater weight. It provides for eight years of exploration across roughly 23 thousand square kilometres and outlays of up to two hundred million dollars. [18] The company values a possible pipeline at around ten billion dollars, but its construction depends on exploration results, confirmation of reserves, financing and a final investment decision. The figures of around fifty billion dollars circulating in the media are not an investor commitment but an estimate of the potential value of the entire programme, and the company itself has given varying amounts and time horizons. [19] For now Delta has obtained the opportunity to look for gas and to establish whether a pipeline makes economic sense.

Its planned route is the most interesting element. The pipeline would end near Spin Boldak, on the border with Pakistan, whose functioning depends today on the state of relations between Islamabad and Kabul. The investor would therefore have to assume that within a decade relations between the two countries will improve. Another explanation is possible. Presence in Afghanistan, contacts with its authorities and a position taken ahead of other investors may have value regardless of whether the pipeline is ever built.

The history of the project makes the second explanation particularly interesting. CentGas is not a new name. A consortium under that name was created in 1997 under the leadership of the American company Unocal, and one of its main shareholders was the Saudi firm Delta Oil, owned by Badr M. Al-Aiban. The plan at the time was a pipeline carrying Turkmen gas across Afghanistan to Pakistan, with the option of extending it to India. Unocal suspended work in August 1998, the day after American missile strikes on targets in Afghanistan, and subsequently withdrew from the consortium. The concept itself survived in the TAPI project, which remains unfinished to this day. [20]

The agreement in Kabul was signed by the minister of mines and petroleum Hedayatullah Badri and by Delta's chief executive Shaher Al-Taqi, while the group on whose behalf it was concluded is chaired by Sheikh Badr Mohammed Al-Aiban of Delta International Holding Group. [21] Historical sources link the Saudi Delta Oil of the 1990s with Badr M. Al-Aiban, whereas corporate continuity between that company and today's group cannot be established on the basis of publicly available documents. [22] What returns is therefore the Delta name, the Al-Aiban name and the concept of a gas corridor running across Afghanistan to Pakistan.

Only this chronology reveals how remarkable the project's return is. In 1997 Delta and Unocal negotiate a trans Afghan pipeline with the Taliban. In August 1998, after American missile strikes, Unocal suspends work and in December leaves the consortium. In 2001, after the attacks of 11 September, the Americans enter Afghanistan. In 2021 they leave. In 2026 the same name, the same family name and a similar concept of a regional gas corridor return, only the Americans are no longer part of it. The project has proved more durable than two decades of international presence and two changes of power in Kabul, because it rests on geography and calculation rather than on alliances or on the memory of 2001.

Khalilzad belongs to this story as well. In the 1990s, working for Cambridge Energy Research Associates, he prepared political risk analyses for Unocal on the planned pipeline and took part in talks with the Taliban in 1997. [22] There is no publicly available evidence that he has business ties with Delta today. [23] His presence at the signing therefore carries mainly political meaning. It shows that contacts with Kabul are maintained by people connected with past American policy, even while Washington itself stays away.

Europe pays but does not decide

Europe is present in Afghanistan today mainly as a payer, and even that form of presence is visibly weakening. This year's humanitarian response plan is worth 1.71 billion dollars, and 21.9 million Afghans need assistance, some 45 per cent of the population. [24] By the end of May 269 million had been raised, 110 million less than in the same period a year earlier, and by 26 August the United Nations tracking system recorded 509 million, just under 30 per cent of requirements. [25] The effects of earlier cuts have already been counted. More than two hundred service points for survivors of violence have ceased to operate, cutting off close to a million women and girls from support. [26] The ban on Afghan women working for international organisations deepens this, because in many parts of the country only their female staff have direct contact with women. [27]

In June 2026 Taliban representatives held talks in Brussels for the first time, with Commission officials and representatives of fifteen member states, and the main subject was the return of Afghans without a right to stay. Human rights organisations criticised those talks, arguing that they may legitimise authorities responsible for the systematic exclusion of women from education and work. [28] The juxtaposition reflects badly on Europe. The humanitarian appeal remains more than two thirds unfunded, and Brussels' first talks with Kabul were mainly about returns.

The problem is not that Europe talks to the Taliban, but that it has not decided what those talks are for. Afghanistan remains in European policy above all a migration and humanitarian problem. Meanwhile new trade routes, energy projects and economic links with Iran, Central Asia, China, Russia and the Gulf states are taking shape around it. Europe watches the process from outside.

The contrast with Damascus is sharpest here. With a capital ruled by the former leader of an organisation descended from al-Qaeda the Union opened a political partnership, economic cooperation and a financial programme. With Kabul it has so far talked mainly about sending people back. The difference can be justified by the transitional process in Syria and its absence in Afghanistan, but it cannot explain why Europe has never defined what it wants from Afghanistan over the coming decade.

This approach may be understandable five years after the withdrawal, but it is hard to regard as a strategy for the next twenty years. The Taliban may remain in power for a long time, and Afghanistan's location will not change. The country will still lie between Central Asia, Iran, Pakistan and China, at the intersection of routes that matter increasingly to Europe. Isolation will not halt these processes, whatever Europe makes of Taliban domestic policy.

Europe should therefore separate political recognition from presence. Maintaining channels of contact, its own knowledge of the situation in the country and the capacity to talk about security, the economy or transit does not amount to legitimising the Taliban. Without these instruments the Union makes its own assessment of Afghanistan dependent on the information and decisions of other states. If it can talk to Kabul about the return of migrants, it should also be able to talk about terrorism, regional security and the economic environment of the country. This applies to American sanctions as well. Europe needs to know where their limits run and what risk they create for European companies, but it is under no obligation to build its own policy solely around the question of what Washington forbids.

None of this is a call for European investment in Afghanistan or for normalising relations with the Taliban. It is about preserving the ability to choose. If in ten years Afghanistan is far more closely tied economically to Central Asia, Iran and the Gulf states, Europe should have its own contacts, knowledge and instruments allowing it to decide whether and how it wants to be part of that arrangement. A policy that reserves for itself only the option of saying no ceases in time to be a policy.

Poland should be among the states that begin this conversation within the Union, and it has a stronger claim to do so than most capitals. Behind it lie two decades of presence in Afghanistan, ahead of it growing engagement in Central Asia, and its real interests concern security, migration, raw materials and transport links. It does not need to recognise the Taliban in order to stop pretending that Afghanistan does not exist.

In practice this means above all bringing Afghanistan into thinking about Central Asia. Consultations with Uzbekistan, Kazakhstan and the other states of the region should regularly cover Afghan transport routes, security, trade and infrastructure projects, because it is there, not in Europe, that the speed of Afghanistan's exit from economic isolation is being decided. A first step could be for Poland to prepare, at Union level, a review of European interests towards Afghanistan covering security, migration, sanctions and the country's links with Central Asia, without prejudging the question of recognising the Taliban.

There is also the Polish stock of experience. For nearly two decades Polish soldiers, diplomats, officials and aid workers served in Afghanistan. Their knowledge, contacts and records have never been collected systematically, and that resource will disappear as successive individuals leave active service. Preserving it is not an exercise in history. It may prove necessary precisely when Europe decides that after years of absence it must rebuild the capacity to act on its own.

For Poland there is one further dimension, which cannot be reduced to interests in Central Asia. Afghanistan was, alongside Iraq, the place where Polish foreign policy paid the highest price for allied loyalty, and part of the political class treated that effort as an investment in a special position in Washington. A great deal of our thinking about the United States still rests on the assumption that years of cooperation build a standing that will one day be settled in our favour. Afghanistan shows that loyalty is not capital whose value can be assumed independently of the current interest of the power concerned. Washington wrote off two decades of its own presence together with its costs, and a year earlier lifted sanctions on a man for whose capture it had itself offered a multimillion dollar reward, because he proved useful. If American policy rests increasingly on immediate calculation rather than on the durability of commitments and institutions [29], a medium sized state is left with one asset, its own interest defined independently and over a horizon longer than a single term of office. This is not an argument for moving away from the United States. It is a condition of standing close to it in any meaningful way.

Afghanistan is therefore more than an unsettled chapter after 11 September. It is a test of whether the West can conduct policy towards a state whose government it does not wish to recognise but which it cannot remove from the map of its own interests. Washington can go on warning against entering Afghanistan, but it cannot assume that others will heed the warning. A quarter of a century after the attacks, the people, projects and interests that were present there before the American intervention are coming back. On 7 September a Saudi group signed an agreement in Kabul. Five days later the Americans issued a warning. Europe did neither. Of those two documents only one is building a presence in Afghanistan today. If Europe does not decide what role it wants to play there in ten or twenty years, it will one day return to a country whose economic and political environment has already been shaped by others.

Notes

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[3] Radio Free Europe / Radio Liberty, Washington Warns US Companies Over Dealing With Taliban-Ruled Afghanistan, 12 September 2026, https://www.rferl.org/a/33852884.html. Afghanistan is not subject to comprehensive US sanctions and the Office of Foreign Assets Control permits a range of transactions under general licences, https://ofac.treasury.gov/faqs/951. On the suspension of US funding for assistance in Afghanistan since April 2025 see Operation Enduring Sentinel, Lead Inspector General Quarterly Report to Congress, April to June 2026, https://oig.usaid.gov/node/8189

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[5] Financial Times, interview with Amir Khan Muttaqi, August 2026 (paywalled).

[6] Kyodo News, 30 August 2026.

[7] Financial Times, 31 August 2026 (paywalled).

[8] The New York Times, op. cit., written statement of the State Department.

[9] Ibid.

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[12] House of Commons Library, op. cit.

[13] Foundation for Defense of Democracies, A Parliament Without Real Opposition in Syria, 2 July 2026; Institute for National Security Studies, The New Syrian Parliament, 12 July 2026.

[14] Reuters, Afghanistan shifts trade to Iran route to avoid Pakistan closures, 14 November 2025, https://www.reuters.com/world/asia-pacific/afghanistan-shifts-trade-iran-route-avoid-pakistan-closures-2025-11-14/

[15] Radio Free Europe / Radio Liberty, As Afghanistan's Border With Pakistan Remains Closed, June 2026; Kabul Now, March 2026, citing United Nations data.

[16] Pajhwok Afghan News, Afghanistan records trade surge with Central Asian countries in 2025, 3 March 2026, https://pajhwok.com/2026/03/03/afghanistan-records-trade-surge-with-central-asian-countries-in-2025/; Afghanistan International, Work on Trans-Afghan Railway is moving forward, says Uzbek president, 17 June 2026, https://www.afintl.com/en/202606179392

[17] Radio Free Europe / Radio Liberty, 12 September 2026, op. cit.

[18] Arab News, 8 September 2026, op. cit., for the twenty five year contract, the eight year exploration phase and the figure of 200 million dollars; the Afghan Ministry of Mines and Petroleum statement, https://gmic.gov.af/en/news_details/261, gives around 22 thousand square kilometres and seven blocks, while the company statement gives 23,317 square kilometres and eleven blocks.

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[25] United Nations Office for the Coordination of Humanitarian Affairs, Afghanistan Humanitarian Update, May 2026, https://www.unocha.org/publications/report/afghanistan/afghanistan-humanitarian-update-may-2026; ibid., Afghanistan: The Cost of Inaction, August 2026, Financial Tracking Service data as of 26 August 2026 (509.3 million dollars, 29.7 per cent of requirements).

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[27] The ban on Afghan women working for non governmental organisations has been in force since December 2022 and for United Nations agencies since April 2023. In July 2025 the International Criminal Court issued arrest warrants for Haibatullah Akhundzada and Abdul Hakim Haqqani on charges of gender persecution, https://www.icc-cpi.int/news/situation-afghanistan-icc-pre-trial-chamber-ii-issues-arrest-warrants-haibatullah-akhundzada

[28] Associated Press, Afghan Taliban hold first, closed-door talks with EU on deportations, June 2026, https://apnews.com/article/f5053fa8c915bf19d0f483ac55fea86e

[29] Maciej Dachowski, Withdrawal as Doctrine. American Power Between Institution and Precedent, Pulaski Commentary, January 2026.

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