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«Unlocking Afghanistan's role in regional connectivity: key challenges and prospects»

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TABLE OF CONTENTS

NORMATIVE REFERENCES **1**

LIST OF ABBREVIATIONS **2**

INTRODUCTION **3**

1: THEORETICAL FRAMEWORK (LIBERAL FUNCTIONALISM, GEOPOLITICAL RIVALRY, AND THE LOCK-AND-KEY MODEL) **21**

1.1 The Limits of Liberal Functionalism in Explaining Afghanistan's Connectivity Deadlock . 21

1.2 Realism, Geoeconomics, and Weaponized Interdependence 24

1.3 Building the Geopolitical Lock-and-Key Analytical Frame 29

1.4 Operationalizing the Frame: Indicators, Outcome Benchmarks, and the Geopolitical Rivalry Matrix 33

2: ACTORS, INTERESTS, AND POTENTIAL OF AFGHANISTAN'S CONNECTIVITY **39**

2.1 Great powers as lock-holders 39

2.2 Regional Rivals and Afghanistan's Central Asian Neighbours 47

2.3 The National Level: The Taliban Gatekeeper 54

2.4 Mapping Actors Through the Geopolitical Rivalry Matrix: Goals, Tools, Red Lines, and Keys 58

2.5 How Actor Strategies Combine into the Mechanisms of the Geopolitical Lock 63

3: THE UAP RAILWAY AND MES AYNAK AS EMPIRICAL CASES **66**

3.1 The Corridor Lock and the UAP Railway 67

3.2 From Corridor Deadlock to Gatekeeper Bargaining 86

3.3 The Gatekeeper's Dilemma Under a Structural Lock 88

3.4 Comparative Snapshot of Additional Corridors 108

3.5 Two Faces of the Geopolitical Lock 113

4: PROSPECTS FOR AFGHANISTAN'S CONNECTIVITY BETWEEN CENTRAL ASIA AND SOUTH ASIA: SYNTHESIS, SCENARIOS, AND POLICY IMPLICATIONS . 118

4.1 Afghanistan Between Central Asia and South Asia: Analytical Overview and Approaches to Unlocking Connectivity 118

4.2 Three Scenarios for Afghanistan's Connectivity 120

4.3 Policy Implications for Central Asian, South Asian, and External Actors 126

4.4 Cross-Case Analysis: The Explanatory Reach of the Geopolitical Lock-and-Key Model 148

CONCLUSION **152**

REFERENCES **159**

Appendix **200**

Appendix A - Research Instruments and Respondent Profile **200**

Table A.1. Overview of interviews and expert survey respondents 200

Table A.2: Geopolitical Rivalry Matrix - actors, tools, red lines, and keys in Afghanistan's connectivity lock 202
Table A.3. UAP Railway and Mes Aynak: comparative case summary 204
Table A.4. Systemic-level lock-holders: tools, keys, and preferred routes 205
Table A.5. Expert survey: distribution of closed-ended responses (Section 2–3 items) 206
APPENDIX B - DEFINITION OF CORE CONCEPTS..... 206

NORMATIVE REFERENCES

The present dissertation contains references to the following normative documents:

- Law of the Republic of Kazakhstan No. 319-III "On Education" dated 27 July 2007.
- Law of the Republic of Kazakhstan No. 103-VIII "On Science and Technology Policy" dated 1 July 2024.
- State General Obligatory Standard for Higher and Postgraduate Education (Order of the Ministry of Science and Higher Education of the Republic of Kazakhstan No. 2 dated 20 July 2022).
- Rules for the Conferment of Academic Degrees (Order of the Ministry of Education and Science of the Republic of Kazakhstan No. 127 dated 31 March 2011).
- Model Regulations on the Dissertation Council (Order of the Minister of Education and Science of the Republic of Kazakhstan No. 126 dated 31 March 2011).
- Model Rules for the Activities of Organisations of Higher and Postgraduate Education (Order of the Ministry of Education and Science of the Republic of Kazakhstan No. 595 dated 30 October 2018).
- Instruction on the Dissertation and Author's Abstract Formatting (Order of the Higher Attestation Committee of the Ministry of Education and Science of the Republic of Kazakhstan No. 377-3zh dated 28 September 2004).
- Regulations on the Qualification Requirements for Scientific Advisers of Doctoral Students at al-Farabi Kazakh National University (Order of the Chair of the Board-Rector of NPJSC "al-Farabi Kazakh National University" No. 575 dated 22 December 2021).
- Regulations on the Plagiarism Review of Students' Written Works (decision of the Scientific Council of NPJSC "al-Farabi Kazakh National University", Protocol No. 2 dated 30 October 2023).
- Regulations on the Use of Artificial Intelligence Technologies at NPJSC "al-Farabi Kazakh National University" (decision of the Scientific Council of NPJSC "al-Farabi Kazakh National University", Protocol No. 6 dated 6 September 2024).
- Interstate Standard GOST 7.1-2003 "Bibliographic Record. Bibliographic Description. General Requirements and Rules of Compilation."

LIST OF ABBREVIATIONS

ADB	-	Asian Development Bank
AML/CFT	-	Anti-Money Laundering / Combating the Financing of Terrorism
BRI	-	Belt and Road Initiative
CASA-1000	-	Central Asia-South Asia Electricity Transmission and Trade Project
CPEC	-	China-Pakistan Economic Corridor
CPO	-	Causal Process Observation
ESG	-	Environmental, Social, and Governance
EU	-	European Union
ICG	-	International Crisis Group
IFIs	-	International Financial Institutions
INSTC	-	International North-South Transport Corridor
IR	-	International Relations
IRJ	-	International Railway Journal
MMG - MCC	-	Metallurgical Corporation of China
OFAC	-	Office of Foreign Assets Control (U.S. Department of the Treasury)
OSCE	-	Organization for Security and Co-operation in Europe
TAPI	-	Turkmenistan-Afghanistan-Pakistan-India (gas pipeline)

INTRODUCTION

Afghanistan lies across the shortest overland routes linking Central Asia to South Asia and the Indian Ocean, and for two decades every major regional connectivity design has assigned it the role of a land bridge. That role has not materialized. Despite sustained international engagement, large-scale reconstruction financing, and repeated intergovernmental commitments, the country remains peripheral to the trade and energy flows its geography would predict [1-4].

This dissertation argues that Afghanistan's disconnection cannot be attributed to underdevelopment, institutional fragility, or technical infeasibility alone, since the principal corridor and resource projects crossing its territory have repeatedly been certified as economically viable and have nonetheless remained unbuilt. Connectivity through Afghanistan is actively suppressed rather than merely unachieved: competing great powers, rival regional states, and a territorially dominant but internationally unrecognized authority in Kabul each attach political and security conditions to their participation, and those conditions are mutually incompatible.

To analyse this configuration the study develops an original geopolitical lock-and-key analytical frame. A geopolitical lock denotes a condition in which connectivity potential is deliberately and multilaterally suppressed rather than simply unrealized. Keys denote the specific, often non-negotiable conditions that each actor demands before it will support, or cease obstructing, integrated connectivity. The sovereign gatekeeper denotes a de facto authority whose territorial control makes its consent indispensable while sanctions and non-recognition bound its bargaining power. Managed dissociation denotes the equilibrium such a lock tends to produce; narrow, reversible, sector-specific arrangements in place of integrated corridors [5]. These concepts are defined and operationalized with observable indicators in Appendix B.

The argument is tested through a theory-guided comparison of two cases, the Uzbekistan-Afghanistan-Pakistan (UAP) Railway and the Mes Aynak copper project, examined through process-tracing, primary document analysis, elite interviews, and an expert survey covering the period from August 2021 to 2026. The dissertation's title should be read in this analytical spirit: “unlocking” names the research question, namely the conditions under which Afghanistan's connectivity between Central Asia and South Asia could be unlocked, rather than a claim that unlocking is imminent. The analysis concludes that managed dissociation, not unlocking, is the most probable medium-term outcome, and identifies the specific conditions that would have to change for that outcome to shift.

Relevance of the research

The relevance of this research stems from three converging developments. First, Afghanistan has re-emerged at the centre of competing corridor and port visions from China’s BRI and the INSTC to trans-Afghan rail projects and the Gwadar-Chabahar rivalry yet remains one of the world’s most disconnected states in functional terms [6-8]. Second, the Taliban’s return to power in August 2021, combined with extensive sanctions and non-recognition, has created a qualitatively new configuration of risks and incentives for regional actors and international financial institutions, directly

affecting Kazakhstan and other Central Asian states seeking diversified access to the Indian Ocean [9-11]. Third, existing theoretical frameworks especially liberal functionalism and complex interdependence struggle to explain why economically rational corridor projects repeatedly stall, indicating the need for new concepts and models that capture how great-power rivalry, regional competition, and Taliban gatekeeper strategies interact to sustain a geopolitical lock on Afghanistan's connectivity [12-14].

Statement of the Research Problem: Geographic Centrality and Persistent Disconnection

Afghanistan's geographic position is not in dispute. The country occupies the shortest overland corridor between the landlocked economies of Central Asia and the deep-water ports of the Arabian Sea, and it has been assigned a bridging role in successive regional designs, from the Belt and Road Initiative and the International North-South Transport Corridor to the Lapis Lazuli route and the CASA-1000 electricity project [15, 16]. Kabul itself has consistently articulated this role, presenting the country as the natural junction of Central and South Asian markets [17]. What is in dispute is why that position has not translated into function.

The empirical record shows a sustained divergence between potential and performance. Afghanistan carries a negligible share of the overland freight moving between Central and South Asia; its formal external trade remains a fraction of what corridor studies identify as achievable; and successive assessments of reconstruction expenditure have documented how limited the durable infrastructural return has been [3, 4]. This is not a record of projects that were never proposed. It is a record of projects that were proposed, studied, endorsed at ministerial level, and then not built.

This divergence is theoretically consequential, because it contradicts the dominant expectation in the study of regional integration. Liberal functionalist accounts hold that where economic complementarity and mutual gains are demonstrable, cooperation should follow: technical bodies, commercial interests, and the prospect of shared prosperity are expected to generate incremental pressure that erodes political obstruction over time. In Afghanistan, the complementarity is demonstrable and the gains are quantified in feasibility studies commissioned by the very institutions that decline to finance construction. The expected mechanism does not operate.

The pattern of partial and conditional implementation is equally revealing. CASA-1000 advanced physically on the Central Asian side while its Afghan segment was ring-fenced through governance and payment arrangements designed to keep revenues beyond the reach of the authorities in Kabul. Road and rail schemes associated with the Lapis Lazuli corridor have not moved decisively beyond planning documents and inaugural ceremonies. Iran has continued to develop cross-border rail links that route regional trade around rather than through Afghan territory, while periodic instability in the Gulf has sharpened, rather than reduced, the incentive of Central Asian states to seek outlets that do not depend on a single chokepoint [18, 19]. Connectivity in the region is therefore not absent; it is selectively arranged to bypass or contain Afghanistan.

The Taliban's return to power in August 2021 sharpened this problem rather than resolving it. The new authorities eliminated the insurgency that had long been cited as the primary obstacle to construction, consolidated territorial control to a degree unmatched since the 1970s, and made regional economic integration an explicit pillar of their claim to govern. If insecurity and fragmentation had been the binding constraint, the post-2021 period should have produced measurable movement. It did not. Sanctions, the freezing of central bank assets, and the withholding of recognition severed the country from the financial infrastructure on which large projects depend, and the deadlock tightened even as territorial control improved.

The research problem of this dissertation is therefore the persistence of this deadlock under conditions that should have loosened it. Stated analytically, the problem consists of three contradictions that any adequate explanation must resolve simultaneously:

Spatial versus functional. Afghanistan is central to macro-regional design and marginal to macro-regional flows; it appears on every corridor map and carries almost none of the traffic those maps anticipate.

Interest versus action. Neighbouring states, external powers, and the authorities in Kabul all publicly affirm the benefits of trans-Afghan connectivity, yet none converts that affirmation into the financing, guarantees, or political commitments that construction would require.

Stability versus stasis. The consolidation of a single territorial authority after 2021 removed the obstacle most frequently invoked before 2021 without unblocking a single major project, which indicates that the decisive constraints lie outside Afghanistan rather than within it.

Resolving these contradictions requires an explanation that treats Afghanistan's disconnection as a produced outcome rather than a residual condition, and that specifies the actors, instruments, and conditions through which it is produced and sustained. That is the task the following sections set out.

Research Question and Hypothesis

The research problem set out above requires an explanation that is causal rather than descriptive, and that can be tested against evidence capable of disconfirming it. The dissertation therefore proceeds from a single explanatory claim: that Afghanistan's connectivity potential remains unrealized because the conditions attached to participation by the actors whose consent is required are mutually incompatible, and that this incompatibility is sustained by the structure of great-power and regional rivalry rather than by conditions internal to Afghanistan. The question, hypothesis, and corollaries below state that claim in a form that specifies what would have to be observed for it to hold, and what would have to be observed for it to fail.

Core Research Question

How does the interplay of great power rivalry (U.S., China, Russia), regional competition (particularly Pakistan–India port rivalries), and Taliban-ruled Afghanistan as sovereign gatekeeper sustain a “geopolitical lock” on Afghanistan’s connectivity between Central Asia and South Asia, and what does this reveal about prospects for transformation into a functional corridor?

This research question builds on structural realist insights about great-power competition and relative gains, as articulated by Waltz (1979), and on recent analyses of Afghanistan's post-2021 political and policy environment, including evolving U.S. policy responses [20, 21].

Sub-Questions

Structural Lock: How do competing U.S., Chinese, and Russian corridor visions create systemic deadlock, suppressing multi-actor projects through Afghanistan, particularly along the Central Asia-South Asia axis?

*Gatekeeper's Dilemma***:** How does Taliban-ruled Afghanistan navigate great power and regional rivalry to secure recognition and regime survival, and what constrains its agency to bilateral, piecemeal deals rather than integrated corridor participation?

Deadlock Mechanism: Why are actors' political and security "keys" (for example, sanctions relief, counterterrorism guarantees, security pacts, recognition) mutually exclusive, perpetuating blockage rather than enabling cooperation?

Outcome Spectrum: Under what conditions does the geopolitical lock produce complete deadlock versus fragmented, bilateral connectivity arrangements, and which scenario best characterizes observed bargaining patterns in the UAP Railway and Mes Aynak cases?

These sub-questions build on existing work on corridor geopolitics and regional gatekeeper roles, realist analyses of great-power competition and relative gains, and recent studies of Afghanistan's post-2021 political and diplomatic deadlock [12, 22].

Central Hypothesis

Afghanistan's connectivity along the Central Asia-South Asia axis remains "locked" not by technical or economic deficits, but because integrated corridors would disproportionately advantage one rival actor (for example, China via BRI-linked routes), prompting other great powers and regional competitors to block or delay such projects through statecraft tools, preferring frozen fragmentation to competitor gains.

This hypothesis draws on realist arguments about relative gains and competitive statecraft in institutional and economic cooperation.

Testable Corollaries

Corollary 1: Great Power Deadlock

Corridor projects that threaten to tilt strategic balances-for example by extending Chinese or Russian influence into South Asia-will provoke intensified blocking efforts by rival powers, resulting in prolonged stalemate even when economic feasibility is demonstrated.

Empirical test: The UAP Railway, a technically and economically viable project connecting Central Asia to the Arabian Sea, remains unbuilt amid competing U.S., Chinese, and Russian corridor visions and their use of financing, diplomatic pressure, and alternative route promotion [20, 22, 23].

Corollary 2: Gatekeeper's Constrained Agency

Taliban-ruled Afghanistan, despite territorial control and strategic positioning, can secure only piecemeal, bilateral deals (for example, resource extraction agreements) rather than comprehensive corridor integration, due to its entanglement in the external

geopolitical lock (primarily U.S. sanctions and non-recognition) and internal ideological constraints.

Empirical test: The Mes Aynak copper mine remains stalled despite Afghanistan-China negotiations in 2023-2025, constrained by U.S. financial sanctions, the absence of international banking access, and China's risk aversion regarding investment protection in a non-recognized state [24].

Corollary 3: Managed Dissociation as Equilibrium

Absent a grand bargain or major shift in great power relations, the most plausible outcome is not unlocking but managed dissociation: a state of selective, fragmented connectivity characterized by bilateral, sector-specific corridors (for example, Chinese mineral extraction routes, limited cross-border electricity deals) that cement partial access while perpetuating Afghanistan's broader strategic and economic isolation [25].

This outcome resonates with, but is distinct from, critical political economy and geography literatures that emphasize uneven, selective, and fragmented forms of connectivity in global production networks, rather than seamless integration [26, 27]. Building on these insights, the dissertation develops the notion of managed dissociation to capture how regional and extra-regional powers selectively under-connect Afghanistan through banking isolation, non-recognition, and ring-fenced project design, while simultaneously over-investing in rival corridors and gateways that bypass Afghan territory. In this perspective, projects such as CASA-1000's ring-fenced Afghan section or alternative port strategies around Chabahar and Gwadar are not anomalies, but concrete manifestations of a broader strategy in which connectivity is calibrated to limit the Taliban's ability to convert transit geography into political leverage. Empirically, bargaining patterns across both cases point to narrow, bilateral arrangements such as Sino-Afghan mining discussions and Uzbekistan-Afghanistan transit talks that proceed largely in isolation from broader regional integration frameworks and are vulnerable to pauses or reversals under external pressure, suggesting a stable but sub-optimal equilibrium of fragmentation [23].

These hypotheses and corollaries provide a falsifiable framework for empirical investigation. The following chapters trace the construction, operation, and persistence of the geopolitical lock through detailed process-tracing of the UAP Railway and Mes Aynak in Chapter 3 (testing Corollaries 1 and 2) and then assess in Chapter 4 whether the overall pattern conforms to managed dissociation (Corollary 3) or to alternative scenarios of either full unlocking or complete isolation. In doing so, the dissertation validates the geopolitical lock-and-key model against competing explanations, particularly liberal functionalism, which predicts convergence on cooperative connectivity solutions driven by shared economic interests [14].

Aim of the dissertation

The Aim of this dissertation is to examine Afghanistan's role in regional connectivity by identifying the key political, security, economic, and institutional factors that shape its integration into regional transport, trade, and energy networks, and to assess the conditions and prospects for enhancing connectivity between Central Asia and South Asia under the evolving regional geopolitical environment.

Research tasks

- To examine the theoretical approaches to regional connectivity in International Relations and to assess the explanatory limitations of liberal functionalism in accounting for Afghanistan's connectivity challenges under conditions of geopolitical competition.
- To develop an analytical framework that explains how the interaction of great-power rivalry, regional competition, external constraints, and domestic governance shapes Afghanistan's role in regional connectivity.
- To analyse the interests and strategies of global and regional actors influencing Afghanistan's connectivity.
- To identify the mechanisms through which geopolitical rivalry affects regional cooperation initiatives.
- To evaluate the implementation prospects of major connectivity initiatives, including the Uzbekistan-Afghanistan-Pakistan (UAP) Railway and the Mes Aynak project, through comparative empirical analysis of political, economic, and security constraints.
- To identify the key conditions under which Afghanistan can strengthen its role as a regional connectivity hub linking Central Asia and South Asia, and to assess alternative trajectories of regional cooperation under different geopolitical scenarios.
- To formulate evidence-based policy recommendations for regional states and international stakeholders aimed at promoting sustainable regional connectivity while balancing geopolitical competition, economic cooperation, and regional security.

These research tasks are addressed sequentially across the dissertation: Tasks 1 and 2 in Chapter 1 (theoretical framework and analytical model), Task 3 in Chapter 2 (actor analysis and the Geopolitical Rivalry Matrix), Task 4 in Sections 2.5 and 3.1-3.3 (mechanisms of the geopolitical lock), Task 5 in Chapter 3 (comparative case studies of the UAP Railway and Mes Aynak), Task 6 in Sections 3.4 and 4.1-4.2 (conditions and scenarios), and Task 7 in Section 4.3 and the Conclusion (policy recommendations).

Object of Research

The object of this dissertation is Afghanistan's role in contemporary regional connectivity between Central Asia and South Asia.

Subject of Research

The subject of this dissertation is the interplay of great-power rivalry (United States, China, Russia), regional competition (particularly Pakistan-India port and corridor rivalries), and Taliban-ruled Afghanistan as a sovereign gatekeeper, and how this interplay sustains a geopolitical lock on Afghanistan-centred connectivity projects.

Theoretical and methodological basis of the research

The theoretical basis of the dissertation is formed by the realist and geoeconomic strands of International Relations theory, read against the liberal functionalist tradition whose expectations the Afghan case disconfirms. Liberal functionalism is not treated as refuted but as mis-specified for contested spaces: its prediction that demonstrable mutual gains generate cooperative momentum holds only where relative-gains concerns are muted and where no actor can convert transit geography into political

leverage. Neither condition obtains in Afghanistan. The study therefore draws on structural and neoclassical realist accounts of relative gains and competitive statecraft, on the literature on geoeconomics and weaponized interdependence, which shows how the financial and regulatory plumbing of interdependence can be used to exclude and discipline, and on work in critical geopolitics and regional security complex theory, which treats infrastructure as an instrument through which power is built into territory [12-14, 26, 28-30].

From this basis the dissertation constructs its own analytical frame, the geopolitical lock-and-key model, which is developed in Chapter 1 and specifies four elements: the structural lock created by the interaction of systemic and regional rivalry; the actor-specific keys that condition participation; the sovereign gatekeeper whose consent is necessary but whose agency is bounded; and managed dissociation as the equilibrium outcome such a configuration produces. Each element is translated into observable indicators, set out in Appendix B and applied in Chapters 2 to 4, so that the frame generates falsifiable expectations rather than post hoc description. The methodology below is designed to test those expectations.

The research design is a theory-guided comparative case study [31-33]. Cases are selected for analytical leverage rather than statistical representativeness. The UAP Railway is a most-likely case for liberal functionalist predictions: it is technically feasible, economically certified, politically endorsed by all three participating states, and therefore a project that functionalist logic expects to proceed. Its failure to proceed constitutes strong evidence against that logic and permits a test of Corollary 1 at the systemic level. Mes Aynak is a critical case for examining agency within structure: a single high-value resource project, a single major investor, and a gatekeeper with undisputed territorial control, which isolates the interaction between gatekeeper bargaining and the external sanctions regime and permits a test of Corollary 2 [34]. Other initiatives, including the Qosh Tepa Canal, TAPI, CASA-1000, and the Lapis Lazuli corridor, are used as supplementary illustrative material to establish that the observed pattern is not an artefact of the two principal cases.

Within each case the analytical technique is process-tracing [35, 36]. The procedure reconstructs the chronological sequence of each project from conception through negotiation to blockage or partial implementation, and then searches for causal process observations, discrete pieces of evidence capable of confirming or disconfirming a hypothesized mechanism. Two illustrations indicate the standard applied. At the systemic level, Russian ministerial statements framing the International North-South Transport Corridor as a reliable alternative to trans-Afghan routes, issued in proximity to Chinese financing announcements, evidence rival-corridor promotion rather than generic scepticism [37-39]. At the unit level, reported internal deliberations over conceding security conditions to Chinese counterparts at Mes Aynak evidence the trade-off between ideological commitment and revenue need that the model attributes to a constrained gatekeeper. The object is to demonstrate not that rivalry exists but that it operates through identifiable diplomatic, financial, and regulatory channels.

The evidentiary foundation combines documentary and original material. The documentary base comprises official state documents, agreements and memoranda, the

reporting of international organizations and financial institutions, statistical and technical materials, and analytical publications; it is described in full, by category, in the section on the reference foundation below and is not itemized again here. Sanctions instruments are treated as a distinct evidentiary category because they establish the legal boundaries within which every actor in the two cases operates [40, 41]. This documentary base is supplemented by original qualitative data generated by the author, consisting of eight semi-structured elite interviews and a fourteen-respondent expert survey.

Three semi-structured elite interviews were conducted with senior officials of the Afghan Ministry of Foreign Affairs responsible for the Central Asia desk, the Political and Economic Affairs Department, and the South Asia desk (coded A1-A3), addressing official perceptions of connectivity initiatives, the effect of sanctions and non-recognition, stated priorities for the UAP Railway and Mes Aynak, and the trade-off between ideological commitment and economic pragmatism. Five further interviews were conducted with regional experts and practitioners based in Kazakhstan and Pakistan (E1-E5), whose specialisms cover Central Asia-South Asia connectivity, regional security, and Afghanistan's political economy. The expert survey covers fourteen academics and policy analysts from Afghanistan (R2, R4-R14) and Pakistan (R1, R3), combining five-point agreement scales with open-ended prompts on obstacles to trans-Afghan connectivity and the relative likelihood of integrated corridors as against fragmented bilateral deals. Respondents were selected purposively for direct policy involvement or sustained analytical engagement; the full profile of interviewees and survey respondents is given in Appendix A, Table A.1, and codes rather than names are used throughout the analysis.

Analysis proceeds in three steps. All material is coded into the Geopolitical Rivalry Matrix by actor, goal, tool, red line, and key, which converts dispersed evidence into a structured comparison [42]. Official texts are then read through content and discourse analysis to identify how positions, strategic narratives, and explicit conditions are articulated, since the wording in which a condition is stated is itself evidence of its non-negotiability [43]. Findings are triangulated across document, interview, and survey streams, and no interpretive weight is given to a claim supported by a single stream. The analysis then moves from within-level process-tracing to cross-level synthesis, examining how constraints originating at the systemic level travel through regional competition to condition the gatekeeper's options, before testing the integrated model against the combined evidence of both cases.

Given the modest number of respondents, neither the interviews nor the survey is used for statistical generalization. They function as a structured comparative instrument for triangulating documentary findings and for capturing the reasoning of actors whose deliberations are not otherwise visible in the public record.

Several limitations follow from the research setting and are managed explicitly:

Constrained fieldwork access. The security situation and the diplomatic sensitivity of the subject precluded extended in-country fieldwork. Interviews were therefore conducted remotely and purposively rather than through broad sampling, and documentary triangulation carries correspondingly greater weight.

Potential bias in sources. Official Afghan communications, diplomatic ambiguity, and self-serving narratives on all sides are addressed through cross-verification across independent source types and through explicit attention to the reputational incentives of each speaker.

Limits of primary testimony. The interview and survey base is small and weighted toward Afghan and regional perspectives. It is treated as evidence of how actors perceive and articulate constraints, not as direct access to the internal decision-making of external powers.

Scope limitation. The study is bounded to 2021-2026 and to Afghanistan's role in Central Asia-South Asia connectivity. Future research could extend the elite interview and survey base as access improves and apply the frame to other contested corridors.

Falsifiability safeguards. The hypothesis and its corollaries are stated so that they can fail. The analysis actively searches for disconfirming evidence, and Section 4.4 weighs the model against the principal alternative explanations, including domestic-fragility, commercial-recalculation, and pure-security accounts.

Taken together, the theoretical frame and the methods described here provide a falsifiable, empirically grounded, and mechanism-centred basis for explaining one of contemporary Asia's most consequential connectivity deadlocks.

The primary source foundation of the dissertation

The empirical and documentary basis of this dissertation is formed by a wide range of sources, which, in accordance with the logic of the research design and the specifics of the topic, can be classified into six main groups. The diversity of the source base makes it possible to examine Afghanistan’s connectivity not only as a transport or economic issue, but also as a multi-level geopolitical process shaped by legal constraints, strategic rivalry, development finance, elite bargaining, and competing regional visions. Such a source foundation ensures the possibility of triangulation and increases the analytical reliability of the conclusions drawn in the dissertation. Each source is assigned to exactly one of the six groups according to its primary documentary type; where a source is relevant to several analytical functions, its placement reflects its type, while its use in the text may cut across the groups.

The first group comprises laws, foreign-policy concepts, programme documents, and official statements and speeches of political leaders. It includes national legislation and normative-legal acts, foreign-policy concepts and strategies, presidential decrees, governmental programme documents, sanctions-related notices and treasury regulations, official communiqués, and the recorded statements of heads of state and ministers concerning Afghanistan and regional connectivity. Of particular importance are the Concept of the Foreign Policy of the Republic of Kazakhstan for 2020-2030 and the official statements of the Kazakh Ministry of Foreign Affairs, the Ministry of Trade and Integration, and the Prime Minister's office on cooperation with Afghanistan, alongside documents issued by the Government of Afghanistan and Taliban-ruled Afghanistan, the U.S. Department of State, the U.S. Department of the Treasury and the OFAC, and the governments of Uzbekistan, Pakistan, Russia, and other regional states engaged in trans-Afghan connectivity [38, 39, 44-62, 63, 64]. These materials establish the formal policy frameworks, the sanctions architecture, and the declared

strategic priorities within which corridor and investment projects are advanced, delayed, or blocked. Among the leaders' statements of direct relevance are the addresses of the President of Uzbekistan to the Seventh Consultative Meeting of the Heads of State of Central Asia and to the Fifth Tashkent International Investment Forum, in which the Trans-Afghan corridor is named among the country's priority connectivity projects [63, 64].

The second group consists of bilateral and multilateral agreements, memoranda of understanding, and the constitutive charters and founding instruments of the international organizations relevant to the cases under study, together with feasibility studies, concession documents, and official diplomatic readouts attached to specific projects. This group includes the documentation associated with the UAP Railway, CASA-1000, TAPI, and the Mes Aynak copper project, as well as materials produced by the trilateral and multilateral negotiation formats involving Afghanistan and its neighbours [65 - 88]. Its analytical value lies in identifying concrete obligations, route preferences, implementation delays, institutional bottlenecks, and the political conditions under which cooperation proceeds or stalls.

The third group is composed of the reports of international organizations and financial institutions, including the World Trade Organization, the Asian Development Bank, the World Bank, the United Nations and its specialized agencies and monitoring mechanisms, the United Nations Economic Commission for Europe, the United Nations Assistance Mission in Afghanistan, the Organization for Security and Co-operation in Europe, and other multilateral bodies working on development finance, transport corridors, sanctions, and regional cooperation [89-113]. These reports supply internationally recognized assessments of project implementation, financing constraints, institutional arrangements, and regional development dynamics, and they establish the technical baseline against which political blockage is identified.

The fourth group includes fundamental theoretical and conceptual works by internationally recognized scholars, which constitute the intellectual foundation of the dissertation. It covers classical and contemporary studies in International Relations theory, realism, liberal institutionalism, interdependence, geoeconomics, political geography, and infrastructure studies, including the works of Waltz, Mearsheimer, Grieco, Keohane and Nye, Fearon, Krasner, Cooley, Hillman, Farrell and Newman, Cowen and Smith, Schindler and Kanai, and other scholars whose contributions are central to the analysis of contested connectivity and strategic competition [7, 8, 12-14, 20, 21, 26, 28 - 30, 114-120]. These works are used to construct the geopolitical lock-and-key frame and to situate the dissertation within broader debates on cooperation, rivalry, corridors, and sovereignty.

The fifth group consists of statistical materials, technical data and modelling reports, development indicators, and cartographic resources. It draws, first, on the publications of the national statistical authorities of the states concerned: the National Statistics and Information Authority of Afghanistan, the Bureau of National Statistics of the Agency for Strategic Planning and Reforms of the Republic of Kazakhstan, the National Statistics Committee of the Republic of Uzbekistan, the Pakistan Bureau of Statistics, and the National Bureau of Statistics of China, whose foreign-trade turnover

series, statistical yearbooks, and sectoral releases provide the national baselines against which corridor performance is measured; and, second, on the UN Comtrade database, which permits bilateral trade figures reported by different national authorities to be cross-checked against a common classification [121-126]. These national and cross-national series are complemented by the technical and modelling outputs of international financial institutions, including corridor cost estimates, freight projections, and route assessments [127-131]. Together they allow the dissertation to compare Afghanistan's geographic potential with its actual functional disconnection, to assess the economic and logistical logic of the projects under study, and to link qualitative interpretation to measurable indicators of regional integration and fragmentation. Where national reporting diverges, as it frequently does for Afghan trade, the divergence is treated as evidence of the informality and measurement gaps that the analysis itself examines, rather than being silently reconciled.

The sixth group comprises analytical publications of think tanks, specialized policy briefs, and materials from reputable media and expert outlets that report on rapidly changing regional developments. Particularly significant are publications by the International Crisis Group, the Carnegie Endowment, CSIS, EUISS, EFSAS, and regional analytical centres, together with reporting on trans-Afghan rail, port rivalry, sanctions, Chinese investment, and Taliban diplomacy [6, 10, 11, 22, 132 - 165, 166]. These sources are especially useful for tracing ongoing bargaining processes, elite framing, and project-specific developments that formal state and intergovernmental documents do not fully capture. They are used critically and are systematically cross-checked against primary documentary and scholarly sources.

In addition to the above-mentioned documentary materials, the dissertation also employs original qualitative data collected by the author, which strengthens the empirical base of the study. As indicated in the methodology section, the research draws on three semi-structured interviews with officials in the Afghan Ministry of Foreign Affairs under Taliban-ruled Afghanistan (A1-A3), five interviews with regional and international experts from Kazakhstan and Pakistan (E1-E5), and a structured expert survey completed by fourteen specialists in Afghanistan's connectivity and regional politics (R1-R14), drawn from Afghanistan and Pakistan (several Afghan respondents are currently based abroad). These materials make it possible to compare official self-representations, expert assessments, and documentary evidence and thus serve as an important instrument of triangulation in testing the mechanisms of the geopolitical lock-and-key model.

Therefore, the primary source foundation of the dissertation is distinguished by thematic breadth, source diversity, and methodological complementarity. The combination of official documents, intergovernmental materials, project records, theoretical literature, technical-statistical evidence, expert analysis, and original interview and survey data makes it possible to examine Afghanistan's connectivity as a complex geopolitical phenomenon and provides a sufficiently robust basis for the conclusions and generalizations proposed in the dissertation.

Extent of scientific elaboration of the research question

The problems of Afghanistan's geography, regional connectivity, regime change, and regional security have been widely discussed in academic and policy literature. Existing studies can be grouped into several strands: work on Afghanistan's historical role in Eurasian trade and transit; analyses of regional transport corridors and port rivalries linking Central Asia, South Asia, and the Indian Ocean; research on the Taliban's governance, sanctions, and post-2021 external relations; and broader debates on realism, interdependence, geoeconomics, and infrastructure power in contested regions.

At the same time, this scholarship remains fragmented. Corridors, ports, sanctions, and Taliban rule are often analysed separately, and there is still no integrated, theoretically grounded explanation of how great-power rivalry, regional competition, sanctions regimes, and the Taliban's role as a de facto sovereign gatekeeper interact to sustain a durable geopolitical lock on Afghanistan-centred connectivity.

This dissertation addresses that gap by developing and applying an original geopolitical lock-and-key analytical model. By combining insights from International Relations theory, infrastructure and geoeconomic studies, Afghanistan-focused governance research, regional scholarship, and project-specific documentation, and by comparing the UAP Railway and the Mes Aynak copper project, the dissertation advances a more integrated and causal understanding of why Afghanistan's geographic centrality has not yet translated into sustained regional connectivity.

The scholarship bearing on this research question is surveyed below by scholarly tradition, since the national and regional schools differ systematically in the questions they pose, the sources they privilege, and the conclusions they reach. Documentary and institutional materials are not treated here; they are described separately, by category, in the section on the reference foundation.

Kazakhstani scholarship, including that of Al-Farabi Kazakh National University. A distinct and increasingly significant body of work has been produced by Kazakhstani researchers and, within it, by scholars of Al-Farabi Kazakh National University. This literature examines Kazakhstan's policy towards Afghanistan, the connectivity dimension of Central Asian regionalism, and the place of Afghanistan in Kazakhstan's multi-vector foreign policy, and it has moved in recent years from a predominantly security-centred framing towards questions of transit, trade, and regional integration [167-173]. Its distinguishing contribution is the treatment of Afghanistan as an object of calibrated engagement rather than solely as a source of threat. Its limitation, from the standpoint of this dissertation, is that it addresses Kazakhstan's bilateral posture more fully than the structural conditions governing the corridor as a whole.

Central Asian scholarship. Research produced in Uzbekistan, Tajikistan, and Kyrgyzstan approaches Afghanistan primarily through the lens of immediate exposure: border security, water and energy interdependence, and the commercial opportunities and risks of cross-border trade [134, 135]. A distinct and directly relevant strand within it treats the trans-Afghan corridor as a subject in its own right. A.K. Abdullaev analyses transport diplomacy as an instrument through which Uzbekistan develops its foreign-

trade routes, which is precisely the instrument this dissertation examines at corridor level [174]; A.Dzh. Nasirov and F.A. Kadirov survey the development of Central Asian transport corridors and the newer regional initiatives in the transport and logistics sphere, including the Mazar-i-Sharif-Kabul-Peshawar alignment [175]; and I. Orokboev assesses the prospects of the Trans-Afghan corridor directly [176]. Tajik scholarship is of particular value because it addresses the Afghan factor from the position of the state with the longest frontier and the most cautious political posture; the work of Sh.Sh. Rizoyon on the foreign-policy priorities of Tajikistan situates the Afghan question within the broader transformation of regional processes in Central Asia and within the formation of national foreign-policy strategy [177]. The strength of this literature lies in proximity and in access to regional policy debate, and in its willingness to treat corridors as political rather than merely logistical objects. Its limitation is that it is largely organized by country and by project, so that the interaction between national strategies, which is the subject of this dissertation, remains underexamined, and that its assessments of corridor prospects are generally framed as expectations of progress rather than as explanations of persistent non-implementation.

Russian scholarship. Russian academic writing has traditionally framed Afghanistan within the security architecture of the post-Soviet space and, more recently, within competing visions of Eurasian transport geography, in which the North-South corridor rather than a trans-Afghan alignment is treated as the authoritative north-south axis [22]. D.B. Malysheva's analysis of post-Soviet Central Asia and Afghanistan as a zone where the interests of the major Asian states intersect is representative of the tradition's central concern, namely the region as an arena of competing external projects rather than as a set of autonomous decision-makers [178]. More recent work in the same tradition has begun to examine the strategies of individual regional states towards Afghanistan and their cross-border consequences, as in the study by M.O. Dmitrieva and A. Dhaka of Uzbekistan's Afghan policy [179]. This scholarship is analytically valuable because it takes seriously the geopolitical content of route selection, which parts of the Western literature treat as a technical matter, and because it supplies the corridor-competition perspective that the present study incorporates into the systemic level of its model. Its limitation is a tendency to subordinate Afghan agency to great-power calculation, which is the assumption this dissertation tests rather than adopts.

Western scholarship. Euro-Atlantic scholarship has made the fundamental theoretical contribution on which this dissertation draws, in the literatures on relative gains and competitive statecraft, on geoeconomics and weaponized interdependence, on the political economy of corridors and infrastructure, and on regional security complexes [7, 8, 12-14, 20, 21, 25, 26, 28, 30, 115, 180, 181]. It supplies the conceptual vocabulary in which the geopolitical lock-and-key model is constructed. Its principal limitation, for the present purpose, is that Afghanistan appears in it mainly as an illustration within studies of intervention, state-building, or sanctions, rather than as a connectivity case examined in its own right.

Afghan scholarship. Work produced by Afghan researchers and institutions addresses the domestic determinants of connectivity outcomes: administrative

capacity, the political economy of customs and transit, the legitimacy claims of the post-2021 authorities, and the domestic consequences of sanctions and non-recognition [182 - 186]. It is indispensable for the gatekeeper dimension of the analysis, since it records how constraints are perceived and articulated from Kabul. Its limitation is uneven access to primary economic data and, in the post-2021 period, a publication environment that constrains critical treatment of the authorities.

The research question addressed in this dissertation is positioned at the intersection of debates on International Relations theory, Eurasian connectivity, sanctions and financial governance, regional security, and the political economy of de facto regimes. Given this complexity, the degree of scientific elaboration of the problem can be most clearly presented through a review of the principal historiographical strands that have examined Afghanistan and its regional environment. In this context, particular attention is paid to Western historiography, Russian and Eurasian historiography, regional and Central Asian historiography, Afghan and Afghanistan-focused historiography, as well as the analytical contributions of international organizations and policy institutes.

In summary, the existing historiography demonstrates a high degree of scientific interest in Afghanistan's geography, connectivity potential, regime transformation and regional context. Western, Russian/Eurasian, regional and Afghan authors, together with international organizations and policy centres, have each illuminated important aspects of the problem. However, the literature remains fragmented along both thematic and geographical lines. It does not yet provide a consolidated, theoretically grounded explanation of how great-power rivalry, regional corridor and port competition, sanctions regimes and the Taliban's role as a de facto sovereign gatekeeper interact to sustain a durable geopolitical lock on Afghanistan-centred connectivity.

The present dissertation seeks to address this gap by developing and applying an original geopolitical lock-and-key analytical model. Building on the above historiographical strands, the model synthesizes insights from International Relations theory, infrastructure and geoeconomic studies, Afghanistan-focused governance research, regional scholarship and project-specific documentation. Through a comparative analysis of the UAP Railway and the Mes Aynak copper project, the dissertation moves the scientific elaboration of the research question from descriptive fragmentation toward a more integrated and causal understanding of why Afghanistan's geographic centrality has not yet been transformed into sustained regional connectivity.

Scientific novelty of the research

The scientific novelty of this dissertation lies in the development of a new explanatory framework for understanding why Afghanistan's considerable geographic potential has not been transformed into sustained regional connectivity. In contrast to existing studies, which tend to examine corridors, sanctions, Taliban governance, or great-power rivalry separately, this dissertation integrates these dimensions into a single analytical model and tests it empirically through comparative case analysis. The main elements of scientific novelty are as follows:

An original geopolitical lock-and-key analytical model is developed to explain connectivity deadlocks in contested geopolitical spaces. The model demonstrates that the failure of connectivity projects is not simply the result of insecurity, weak institutions, or lack of investment, but of a structural deadlock produced by mutually incompatible political and security conditions demanded by external actors and the de facto territorial authority.

The dissertation introduces and operationalizes the concept of the sovereign gatekeeper for the study of post-2021 Afghanistan. In this framework, Taliban-ruled Afghanistan is conceptualized not merely as a domestic regime or security actor, but as a de facto territorial authority whose cooperation is indispensable for corridor implementation, while whose agency remains constrained by sanctions, non-recognition, and competing external pressures.

The study proposes the concept of managed dissociation as a distinct analytical outcome situated between comprehensive regional connectivity and complete isolation. This concept captures the emergence of fragmented, bilateral, and sector-specific arrangements under conditions in which comprehensive connectivity remains blocked, thereby offering a new way to interpret the likely trajectory of Afghanistan-centred projects under continuing geopolitical rivalry.

A new Geopolitical Rivalry Matrix is formulated and applied to map the goals, tools, red lines, and "keys" of systemic, regional, and gatekeeper actors. This makes it possible to identify how the interaction of the United States, China, Russia, Pakistan, India, Iran, Central Asian states, and the Taliban generates overlapping veto structures that impede integrated corridor development.

The dissertation makes a novel comparative contribution by analysing the UAP Railway and the Mes Aynak copper project within one common explanatory framework. Rather than treating transport and extractive projects as unrelated sectors, the study demonstrates that both cases reveal different expressions of the same geopolitical lock: one at the level of regional corridor rivalry and the other at the level of gatekeeper bargaining under sanctions.

The research contributes methodological novelty by combining comparative case study analysis, process tracing, primary document analysis, elite interviews, and an expert survey within one multi-method design. This approach allows the dissertation not only to identify structural constraints, but also to trace the causal mechanisms through which these constraints shape project outcomes across distinct empirical domains.

The dissertation provides a new explanation for why liberal expectations of functional connectivity fail in the Afghan case. It demonstrates that even where economic rationality, technical feasibility, and regional demand exist, connectivity may remain blocked when external and regional actors prioritize relative gains, strategic denial, and controlled access over absolute economic benefits.

The study generates new empirical knowledge by systematizing dispersed evidence on sanctions, financial plumbing, port rivalry, corridor competition, and Taliban bargaining behaviour into a coherent causal account. In doing so, it moves beyond descriptive project analysis and shows how sanctions architecture, route

competition, and regime-survival calculations combine to produce long-term fragmentation rather than integrated regional opening.

Provisions submitted for defence

1. Afghanistan's persistent connectivity deadlock is best explained by a geopolitical lock rather than by technical or institutional weakness alone. The dissertation demonstrates that the failure of major connectivity projects involving Afghanistan cannot be adequately understood only through references to insecurity, weak institutions or lack of financing. Instead, a structural geopolitical lock operates, in which great-power rivalry, regional corridor and port competition, and sanctions regimes interact to suppress Afghanistan's connectivity potential despite its geographic centrality and repeated initiatives to use the country as a land bridge.

2. The geopolitical lock-and-key analytical model constitutes a new theoretical framework for analysing connectivity in contested sovereignties. The study develops and substantiates an original geopolitical lock-and-key model, which explains connectivity outcomes by focusing on the incompatibility of "keys": specific, often non-negotiable political and security conditions demanded by systemic powers, regional states and the territorial authority. The model shows that corridors remain blocked when these keys are mutually exclusive, even where projects are technically feasible and economically rational.

3. Taliban-ruled Afghanistan functions as a sovereign gatekeeper whose bounded agency is central to connectivity outcomes. The dissertation argues that, after 2021, the Taliban should be conceptualized as a sovereign gatekeeper that exercises effective territorial control, collects revenues and issues transit permissions, but whose bargaining power is constrained by sanctions, non-recognition and external vetoes. Gatekeeper agency is real, but insufficient on its own to unlock connectivity if the structural lock created by external actors remains in place.

4. The concept of managed dissociation captures the most likely equilibrium in Afghanistan's connectivity under ongoing rivalry and sanctions. The research introduces and empirically grounds the concept of managed dissociation as an intermediate outcome between comprehensive regional connectivity and complete isolation. In this equilibrium, external powers and the Taliban construct narrow, sector-specific and bilateral arrangements (for example, limited mineral exports or electricity flows) while comprehensive, multi-purpose corridors remain blocked. Managed dissociation thus provides a more accurate description of Afghanistan's emerging connectivity pattern than binary notions of "open" or "closed" integration.

5. The UAP Railway and the Mes Aynak copper project are two faces of the same geopolitical lock. The comparative analysis shows that the UAP Railway and Mes Aynak are not isolated cases in different sectors, but two manifestations of the same underlying mechanism. UAP reveals how great-power rivalry and competing port strategies reinforce the lock at the corridor level, whereas Mes Aynak illustrates how sanctions and financial restrictions limit gatekeeper bargaining at the project level. Together, the cases confirm that the lock operates across both transport and extractive domains.

6. Connectivity in Afghanistan fails to follow liberal functionalist expectations because relative gains and regime-survival logics dominate over absolute economic benefits. By combining theoretical analysis with empirical process tracing, the dissertation demonstrates that actors involved in Afghan connectivity systematically prioritize denying rivals strategic advantage and defending regime survival over maximizing joint economic gains. This explains why projects that are economically attractive and repeatedly endorsed in official strategies still fail to reach implementation or remain symbolic, thereby challenging liberal assumptions that economic interdependence will naturally drive cooperation.

7. The multi-method research design and the Geopolitical Rivalry Matrix provide a replicable approach for analysing connectivity deadlocks in other contested regions. The study shows that the combination of comparative case study analysis, process tracing, primary document analysis, elite interviews and an expert survey, structured through the Geopolitical Rivalry Matrix, yields a systematic way to map actors' goals, tools, red lines and keys. This approach is not only applicable to Afghanistan but can be adapted to analyse connectivity deadlocks in other contested corridors and sanctioned environments.

Theoretical and practical significance of the research

The theoretical significance of the dissertation lies in the development of the geopolitical lock-and-key analytical model, the operationalization of the sovereign gatekeeper concept for non-recognized and sanctioned regimes, and the introduction of managed dissociation as a conceptual category situated between comprehensive connectivity and complete isolation. These contributions extend debates in International Relations theory, geoeconomics, and infrastructure studies by specifying the causal mechanisms through which great-power rivalry, regional competition, and sanctions regimes suppress connectivity in contested spaces, and by providing a falsifiable, portable framework applicable to other contested corridors and sanctioned environments.

The practical significance of the research lies in its evidence-based policy recommendations for regional states, external powers, international financial institutions, and Taliban-ruled Afghanistan, formulated in Section 4.3 and developed further in the Conclusion. The Geopolitical Rivalry Matrix and the associated observable indicators offer analysts and policymakers a replicable diagnostic instrument for mapping actors' goals, tools, red lines, and keys in connectivity disputes. The findings are of direct relevance to Kazakhstan and other Central Asian states formulating calibrated engagement strategies toward Taliban-ruled Afghanistan and can be used in teaching and research on Central and South Asian regional politics.

Approbation of the research results

The main provisions, findings, and conclusions of the dissertation are reflected in the author's publications in peer-reviewed international and national journals, including articles in International Relations & International Law Journal, Public Administration and Civil Service, Kazakhstan-Spectrum, Frontiers in Political Science, and Discover Global Society [168-171, 173]. These publications, prepared individually and in co-authorship with the scientific consultants and other researchers, address the

theoretical and empirical dimensions of Afghanistan's role in regional connectivity, including its political transformation under the Belt and Road Initiative, Afghan-Uzbek relations after 2021, competing governance models, and Kazakhstan's engagement with Taliban-ruled Afghanistan.

Structure of the dissertation.

The dissertation consists of an introduction, four chapters, a conclusion, a list of references, and two appendices, and its architecture follows the elements of its title. Chapter 1 constructs the theoretical framework, critiques liberal functionalist expectations, and develops and operationalizes the geopolitical lock-and-key model. Chapter 2 establishes Afghanistan's role in regional connectivity by mapping the strategic environment, the interests, red lines, and keys of systemic, regional, and national actors. Chapter 3 identifies the key challenges through the comparative empirical analysis of the UAP Railway and the Mes Aynak copper project, supplemented by additional corridors. Chapter 4 assesses the prospects, evaluating the hypothesis and corollaries against the evidence, developing three future scenarios, and deriving differentiated policy implications for Central Asian, South Asian, and external actors. The conclusion presents the substantiated results and the provisions submitted for defence. Appendix A contains the research instruments, the respondent profile, and the comparative case tables; Appendix B contains the definitions and observable indicators of the core concepts.

1: THEORETICAL FRAMEWORK (LIBERAL FUNCTIONALISM, GEOPOLITICAL RIVALRY, AND THE LOCK-AND-KEY MODEL)

Afghanistan's continued disconnection from regional infrastructure networks, despite its geographic centrality between Central Asia, South Asia, and the Middle East, cannot be understood solely through descriptive accounts of war, underdevelopment, or state-building failure. Instead, it requires a theoretical framework that explains why strongly positive economic logics of connectivity repeatedly fail to overcome geopolitical rivalry, sanctions, and contested sovereignty. This chapter constructs such a framework by situating Afghanistan's post-2021 connectivity impasse within broader debates on liberal functionalism, realism, geoeconomics, and the politics of infrastructure, and then developing an original geopolitical lock-and-key model tailored to contested spaces like Afghanistan. This chapter addresses Research Tasks 1-3 by critically engaging the existing literature on connectivity and cooperation, developing the geopolitical lock-and-key analytical model, and operationalizing its core concepts for empirical analysis.

The chapter proceeds in four steps. Section 1.1 critiques liberal functionalist and technical-economic approaches that treat corridors as neutral conduits for trade and predict that shared economic interests will eventually override political conflict, showing why these assumptions consistently mispredict Afghanistan-related projects such as TAPI, CASA-1000, and the UAP Railway. Section 1.2 turns to realist and critical infrastructure literatures to foreground relative gains, infrastructure statecraft, and contested sovereignty, arguing that corridors and ports in Eurasia function as instruments of competition among great powers and regional rivals. Section 1.3 develops the geopolitical lock-and-key analytical model, specifying three core elements: a structural lock produced by great-power and regional rivalries, actor-specific political and security "keys," and Taliban-ruled Afghanistan as a sovereign gatekeeper with bounded agency. Section 1.4 then operationalizes these concepts into observable indicators that guide the subsequent empirical analysis of the UAP Railway and the Mes Aynak copper project, linking the theoretical framework directly to the research questions and hypotheses outlined in the Introduction.

1.1 The Limits of Liberal Functionalism in Explaining Afghanistan's Connectivity Deadlock

The central argument of this section is that liberal functionalism, the dominant theoretical framework applied to connectivity and regional cooperation, is systematically limited in explaining Afghanistan's connectivity deadlock because it assumes that shared economic interests eventually override political rivalry and treats infrastructure as a technical problem rather than an instrument of statecraft. This section establishes those limits empirically and conceptually, preparing the ground for the realist and geoeconomic alternative developed in 1.2. It proceeds in three analytical steps: first, specifying what liberal functionalism predicts for the Afghan case; second, presenting the evidence that contradicts those predictions; and third, identifying the specific theoretical assumptions that generate the misprediction. This analytical

sequence ensures that the theoretical review serves the dissertation's argument rather than merely surveying the literature.

Liberal and functionalist approaches to regional cooperation rest on the assumption that increasing economic and technical interdependence generates pressures for political accommodation over time [14]. From Mitrany's early functionalist thesis that cooperation in "low-politics" sectors can spill over into broader integration to later work on complex interdependence, this tradition expects that shared material interests progressively erode zero-sum thinking and raise the costs of sustained conflict for all parties [14, 28]. Within this perspective, infrastructure is conceptualized primarily as a technical enabler of interdependence: transport corridors, pipelines, transmission lines, and port facilities are treated as neutral conduits whose routing and construction follow cost-benefit calculations and engineering feasibility, rather than as instruments of security competition [7]. Provided that absolute gains are sufficiently large and technical obstacles manageable, functionalist logic predicts a self-reinforcing dynamic in which states, firms, and international organizations cooperate to overcome political frictions to realize those gains.

Applied to Afghanistan and Central Asia, a liberal-functionalist lens generates clear expectations. Landlocked Central Asian republics have strong incentives to diversify away from dependence on Russian infrastructure and to secure shorter, cheaper access to maritime markets [8, 128]. Afghanistan, situated between Central and South Asia, faces urgent needs for transit revenues, employment, and lower-cost imports after decades of conflict and aid dependence [89-91]. Pakistan seeks to deepen its role as a North-South trade hub via Karachi and Gwadar, while India promotes Chabahar and associated land routes as an alternative gateway to Afghan and Central Asian markets [187-189]. International financial institutions and many policy documents frame trans-Afghan infrastructure as a "win–win" opportunity: by linking Central Asia to the Indian Ocean through Afghanistan, all participating states are expected to enjoy significant absolute gains from trade, investment, and connectivity [23, 89, 90].

On this view, overlapping material interests and Afghanistan's position on one of the shortest overland paths between Central Asia and deep-seaports should, over time, generate mounting pressure for cooperative solutions. Flagship initiatives such as the TAPI gas pipeline, the Central Asia-South Asia (CASA-1000) electricity project, the Lapis Lazuli corridor, and, more recently, the UAP Railway and the Mes Aynak copper project ought gradually to move from planning and feasibility phases to implementation [23, 127]. Even if conflict, governance deficits, and capacity constraints delay progress, a functionalist expectation is that the scale of potential mutual gains will eventually push actors to bracket political disputes and converge on pragmatic arrangements [14].

The empirical record instead reveals a systematic pattern of blockage and fragmentation. Despite repeated feasibility studies, high-level political declarations, and, at times, committed financing, major connectivity and energy projects transiting Afghanistan have stalled, been frozen, or advanced only in truncated and highly partial forms [23]. Construction of TAPI inside Afghanistan has been repeatedly delayed by

insecurity, financing uncertainty, and shifting regional politics, preventing the pipeline from moving beyond preparatory work and limited physical activity on the ground. CASA-1000's Afghan segment-despite materials already being delivered and a substantial share of tower foundations completed before August 2021-was paused following the Taliban's return to power, leaving a technically feasible and nearly ready project in limbo under a new political context [23, 89, 90]. Road and rail elements associated with the Lapis Lazuli corridor have likewise struggled to advance beyond symbolic inaugurations and planning documents, with little evidence of sustained, high-volume cross-border flows materializing through Afghan territory [127].

The post-2021 period has sharpened rather than resolved this paradox. From a functionalist standpoint, the emergence of a single de facto authority with strong fiscal incentives, Taliban-ruled Afghanistan, should reduce coordination problems and provide a more predictable counterpart for negotiations over transit rights and resource extraction [140]. Taliban-ruled Afghanistan has explicitly prioritized economic self-sufficiency and regional integration in decrees and official statements, emphasizing transit revenues, mining, and regional trade as pillars of regime survival [10, 11]. It has actively courted investment in rail, road, and energy projects, presenting itself to neighbours and external powers as a pragmatic security provider for critical infrastructure.

Yet the core trans-Afghan projects that would anchor an integrated corridor remain blocked or highly constrained. The UAP Railway, promoted by Uzbekistan and Pakistan as a transformative North-South axis linking Central Asia to the Arabian Sea and backed by feasibility work involving multilateral partners, had not seen any track laid inside Afghanistan as of 2026, despite its economic rationale and repeated public endorsements [23, 65, 190]. Similarly, Mes Aynak, one of the world's largest undeveloped copper deposits and a cornerstone of both Taliban-ruled Afghanistan revenue projections and China's resource-security considerations, remains only partially activated more than a decade after the initial concession, constrained by sanctions, security risks, heritage concerns, and reputational calculations that deter full-scale implementation [133]. At the same time, the overall flow of regional trade across Afghanistan's borders remains negligible compared to estimated potential, constrained by insecurity, cross-border closures, sanctions, and the absence of integrated infrastructure and regulatory regimes [89-91].

These outcomes are difficult to reconcile with a framework that treats infrastructure primarily as a technical good governed by absolute gains. If shared material interests and technical feasibility were sufficient, projects such as TAPI, CASA-1000, the UAP Railway, and Mes Aynak should, even with delays, converge toward implementation as actors adjust positions to capture mutually beneficial outcomes [14]. Instead, the pattern suggests a different logic: the higher the strategic stakes of a corridor or project, the more intractable the political, security, and financial obstacles become, and the more willing regional and extra-regional actors appear to forgo absolute gains in order to prevent rivals from consolidating advantage [12, 13, 181]. Rather than converging on cooperation, key states treat connectivity as a zero-sum instrument of competition, using the promotion or obstruction of projects, as well

as the routing of alternative corridors, to shape alignments, dependencies, and spheres of influence [7, 8, 25].

These limits are best understood as a matter of scope conditions rather than of wholesale theoretical failure. Liberal functionalism presupposes recognized sovereign counterparts, consolidated institutions, low sanctions exposure, and functioning access to international finance; in post-2021 Afghanistan each of these enabling conditions is absent or severely degraded, so the framework is mis-specified for the context rather than simply refuted by it. The dissertation accordingly treats the Afghan case as a most-likely case on the economic-incentive dimension, where absolute gains are large, demonstrated, and repeatedly affirmed, while recognizing that the institutional preconditions of functionalist cooperation do not hold. The finding that follows is correspondingly precise: under these conditions, relative-gains calculations and regime-survival imperatives dominate absolute economic benefits, which is why even powerful material incentives fail to generate cooperative implementation.

Afghanistan's connectivity trajectory under these conditions exposes the core limits of liberal functionalism in high-stakes geopolitical environments. Functionalist accounts typically downplay geopolitics as an independent causal factor, assume a neutral and recognized sovereign partner, and underestimate deliberate strategic obstruction through tools such as sanctions, diplomatic pressure, and route diversification [12, 14]. In the Afghan case, however, sanctions and non-recognition have severed Taliban-ruled Afghanistan from much of the global financial system, limiting access to large-scale multilateral finance and complicating contract enforcement, while rival corridor strategies such as the INSTC and Chabahar-centred alternatives systematically bypass Afghan territory [9, 20, 21]. Explaining why technically and economically attractive projects repeatedly fail or fragment into narrow, reversible bilateral arrangements despite strong material incentives therefore requires a different theoretical vantage point, one that foregrounds relative gains, infrastructure as statecraft, contested sovereignty, and the bounded agency of a sovereign gatekeeper operating under sanctions and non-recognition [22, 184]. The next section turns to realist, geoeconomic, and critical infrastructure literatures and begins to build the geopolitical lock-and-key framework that better captures Afghanistan's connectivity deadlock.

1.2 Realism, Geoeconomics, and Weaponized Interdependence

The empirical limits of liberal functionalism in Afghanistan's case point toward a different conceptual lens one that foregrounds power, rivalry, and the strategic use of economic instruments. A growing body of work in realism, geoeconomics, critical infrastructure studies, and the literature on contested sovereignty has re-politicized infrastructure, portraying corridors, ports, and pipelines not as neutral conduits for trade but as instruments of statecraft embedded in broader struggles over hierarchy, influence, and security [7, 8, 12]. This section draws on those strands to develop the foundations for the geopolitical lock-and-key model, showing how great-power and regional rivalries, combined with Afghanistan's status as a non-recognized, sanctioned regime, transform seemingly technical connectivity projects into arenas of competitive statecraft rather than cooperative problem-solving [20-22].

Realism, relative gains, and geoeconomics

Realist theory provides a first building block for a geopolitical reading of infrastructure. Structural realism emphasizes anarchy, security competition, and the centrality of relative gains: states are concerned not only with whether they gain from cooperation, but with how much they gain compared to rivals [12, 13, 28]. Under conditions of strategic rivalry, even highly beneficial economic cooperation may be rejected or obstructed if it is perceived to disproportionately strengthen an adversary's capabilities or regional position [12, 181]. In such settings, infrastructure projects become tools through which states seek to lock in dependencies, extend influence, and deny competitors access to critical routes and nodes [7, 8].

The concept of geoeconomics builds on and extends these realist insights. Rather than treating economic instruments as separate from security, geoeconomic analyses stress how trade, finance, sanctions, and infrastructure are deployed for strategic purposes [20, 21, 191]. In the Eurasian context, corridor initiatives such as China's BRI, Russia's INSTC, and Western-backed alternatives are best understood as overlapping geoeconomic strategies designed not only to facilitate commerce but also to shape alignments, regulatory standards, and patterns of dependence [7, 8, 25]. Infrastructure, in this view, is an instrument through which major powers seek to "write" their preferences into physical space: by choosing where lines and ports are built, which financing instruments are used, and which actors are included or excluded, states attempt to influence the distribution of power over the long term [7, 192].

Afghanistan's recent history illustrates these dynamics. China's corridor thinking in Central and South Asia is shaped not only by a search for efficiency, but by concerns about securing westward access and avoiding over-dependence on maritime chokepoints; Russia promotes the INSTC and related networks partly to consolidate its influence in Eurasia and reduce Western leverage; and the United States has alternately supported or discouraged specific corridor options, including Chabahar-linked routes, in line with broader containment strategies toward both China and Iran [8, 20, 22]. In this environment, trans-Afghan projects are evaluated not simply on economic merit but on their anticipated impact on regional balances of power: if a corridor is expected to disproportionately benefit a rival by granting it privileged access to markets, resources, or strategic depth, other actors may rationally move to block, delay, or re-route it, even at significant economic cost [12, 13, 25].

Infrastructure as statecraft and weaponized interdependence

Recent scholarship on "weaponized interdependence" further clarifies how infrastructure and connectivity can be leveraged for coercive purposes. Far from being neutral, dense networks of finance, data, and transport create asymmetric dependencies that powerful states can exploit through selective access, sanctions, or regulatory pressure [25, 30]. Control over key nodes such as ports, junctions, or clearing systems allows dominant actors to punish adversaries, reward partners, or shape third-party behaviour, making infrastructure a medium through which states can project power without resorting to overt military force [7, 192].

In Afghanistan's case, the international sanctions regime and its associated financial infrastructure constitute a central dimension of weaponized interdependence

[20, 21, 193]. By restricting access to the global banking system, freezing assets, and threatening secondary sanctions, the United States and its partners raise the costs and legal risks of large-scale engagement with Taliban-ruled Afghanistan. This does not only affect humanitarian flows; it also constrains the financing and implementation of major connectivity projects that require cross-border payments, guarantees, and insurance. While some states explore mechanisms to partially circumvent these constraints, the net effect is to steer investment and trade flows toward alternative corridors that avoid Afghan territory, reinforcing its marginalization despite its geographic centrality [9, 22].

Regional actors similarly use infrastructure choices as tools of statecraft. Pakistan's promotion of Karachi and Gwadar as gateways for Central Asian trade, India's investment in Chabahar and its access roads, and Iran's efforts to position itself as a key transit hub via INSTC all reflect deliberate strategies to shape regional connectivity architectures in their favour [194]. These strategies often treat Afghanistan less as a neutral transit space and more as a contested corridor whose "unlocking" under the wrong conditions could strengthen a rival's position. Rather than seeking to maximize collective gains from a shared trans-Afghan route, states frequently prefer to invest in bypass projects such as alternative rail links via Iran or maritime options that preserve their own gatekeeping roles while limiting competitors' access to Afghan geography [8, 25].

Infrastructure as statecraft and sanctions "plumbing"

Beyond classical accounts of functional spillovers, recent work on infrastructure as statecraft emphasizes how the technical "plumbing" of finance, payments, and data can be weaponized to discipline or exclude states from global circuits of interdependence [30, 195]. Studies of sanctions and financial networks show that control over payment systems such as SWIFT, dollar-clearing, and correspondent banking relationships allows leading powers to shape the feasibility of large-scale infrastructure projects, regardless of their local economic rationale. Building on this literature, this dissertation treats sanctions regimes, banking restrictions, and insurance constraints not as exogenous obstacles but as infrastructural locks that can be activated or relaxed by key actors to condition when and how projects like the UAP Railway or Mes Aynak move from paper to implementation [20, 21]. Afghanistan's connectivity is governed not only through visible border controls and security guarantees, but also through semi-invisible financial pipes whose operation is tightly linked to questions of recognition and compliance with Western-led sanctions architectures [20, 21, 193].

Critical geopolitics and the materiality of corridors

Critical geopolitics and political geography add a complementary insight: they emphasize how power is literally "built into" physical landscapes through the siting, routing, and design of infrastructure [26, 27]. Corridors and logistics networks do not simply reflect pre-existing political orders; they help constitute them by enabling some flows and blocking others, privileging certain regions and actors while marginalizing alternative pathways. From this perspective, maps of planned railways, pipelines, and highways are not neutral technical diagrams but political projects that inscribe visions of regional order.

Afghanistan's position on such maps is emblematic. On most contemporary corridor plans BRI extensions, INSTC proposals, port-linked road and rail projects the country appears as a natural bridge between Central Asia and the Indian Ocean [7, 180]. Yet, as the Introduction showed, the materialization of these routes on the ground has been minimal: many projects remain confined to "corridor imaginaries," feasibility reports, or symbolic inaugurations [89-91]. At the same time, infrastructure that does materialize around Afghanistan such as the expansion of Iranian port and rail capacities linked to INSTC or the development of Gwadar effectively draws flows away from Afghan territory, embedding its marginalization in concrete and steel [8, 22].

Critical political economy work on global production networks underscores that such outcomes are not anomalies but part of a broader pattern of "selective connectivity," in which networks are deliberately designed to integrate some spaces and bypass others [26, 27]. Rather than assuming a binary between integration and isolation, this literature emphasizes uneven, fragmented forms of connection that facilitate certain circuits of capital, labour, and resources while rendering other territories peripheral or disposable. Afghanistan's experience with halted, ring-fenced, or bypassed projects such as the ring-fenced Afghan segment of CASA-1000 or alternative port strategies around Chabahar and Gwadar fits this pattern: connectivity is carefully calibrated to extract limited benefits while preventing Afghanistan from converting its transit geography into broader political leverage [23, 25, 134].

Contested sovereignty, sanctions, and gatekeeper agency

A final strand of literature concerns contested and non-recognized regimes. Work on "de facto states" and sovereignty as "organized hypocrisy" highlights that entities lacking formal recognition may nonetheless exercise effective control over territory and borders and participate in international economic exchanges [114, 196]. However, their engagement is shaped by sanctions, legitimacy deficits, and internal ideological constraints that limit both their policy options and the willingness of external actors to cooperate with them [184]. These regimes can function as sovereign gatekeepers, using control over access points and resources to bargain with external powers, but their agency is bound by structural conditions they did not choose [183].

Taliban-ruled Afghanistan exhibits precisely this profile. Since August 2021, Taliban-ruled Afghanistan has exercised de facto control over most of the country, including border crossings and key resource sites, and has engaged in bilateral negotiations over transit, trade, and mining with neighbouring states and external investors [140]. It collects customs revenues, issues permits, and provides (varying) security guarantees for infrastructure, satisfying core criteria for a gatekeeping authority [184]. At the same time, comprehensive sanctions, frozen central bank assets, and the absence of formal recognition severely constrain Afghanistan's access to the global financial system and multilateral funding, while internal ideological commitments limit the extent of concessions Taliban-ruled Afghanistan can credibly make on issues such as human rights, governance, and counter-terrorism [20, 21, 193].

This combination creates what later chapters describe as the gatekeeper's dilemma. On the one hand, Taliban-ruled Afghanistan has strong incentives to leverage its territorial control over corridors and resources to obtain revenue and incremental

recognition and has actively sought to do so in cases like Mes Aynak and UAP-related transit agreements [140]. On the other hand, its lack of recognition and the broader geopolitical environment mean that it cannot unilaterally unlock major multilateral projects: key external actors can use sanctions, financing decisions, and diplomatic pressure to veto or constrain projects they perceive as strategically harmful [20-22]. Taliban-ruled Afghanistan thus operates as a sovereign gatekeeper whose decisions matter for specific deals, but whose agency is embedded within a larger structural geopolitical lock it cannot by itself dismantle [184].

Toward a geopolitical lock-and-key framework

Three further bodies of scholarship inform the framework developed below, even though none of them, taken alone, accounts for the Afghan deadlock. Neoclassical realism directs attention to how systemic pressures are filtered through domestic institutions, elite perceptions, and regime characteristics, a filtering logic that this study incorporates through the bounded agency of the gatekeeper. Regional security complex theory emphasizes that security interdependence clusters regionally, which helps situate the Pakistan-India-Iran endpoint rivalries and the Central Asian threat perceptions that surround Afghanistan. Recent work on infrastructure power and geoeconomic statecraft, finally, treats corridors, finance, and standards as instruments through which states project influence and impose dependence. Each of these approaches supplies an essential layer; none, however, specifies how great-power rivalry, regional competition, sanctions regimes, and gatekeeper politics jointly sustain a durable, self-reinforcing lock on a specific contested space. The geopolitical lock-and-key model is constructed precisely to integrate these insights into one multi-level, testable mechanism.

Taken together, these literatures on realism and relative gains, geoeconomics and weaponized interdependence, critical infrastructure and selective connectivity, and contested sovereignty and gatekeeper agency point toward a different way of conceptualizing Afghanistan's connectivity impasse. Rather than assuming that corridors will ultimately be driven by technical feasibility and shared economic interests, they suggest that infrastructure decisions in and around Afghanistan are structured by a multi-tiered geopolitical struggle in which great powers and regional rivals actively maintain a state of strategic under-realization [8, 12, 22]. In this struggle, actors hold and deploy specific political and security-keys, non-negotiable conditions related to sanctions, recognition, counter-terrorism, route choices, and investment protection, and the interaction of these keys with Taliban-ruled Afghanistan's bounded gatekeeper agency produces a durable geopolitical lock on Afghanistan's connectivity.

The next section builds directly on these insights to develop the dissertation's central theoretical innovation: the geopolitical lock-and-key analytical model. It specifies how the structural lock created by great-power and regional rivalries, the incompatible keys demanded by different actors, and the behaviour of the sovereign gatekeeper jointly generate the observed pattern of stalled, fragmented, and selectively bypassed connectivity projects in post-2021 Afghanistan.

1.3 Building the Geopolitical Lock-and-Key Analytical Frame

The preceding discussion suggests that Afghanistan's connectivity impasse cannot be understood as a temporary coordination failure or a simple by-product of underdevelopment; it is better conceived as a strategically produced equilibrium emerging from great-power rivalry, regional competition, and the constrained agency of a non-recognized regime. To capture this configuration, the dissertation advances an original geopolitical lock-and-key analytical model. The model synthesizes realist insights on relative gains and competitive statecraft [12, 13, 181], geoeconomic analyses of infrastructure as an instrument of power [7, 8, 25], and research on de facto sovereignty and gatekeeper agency under sanctions [114, 184]. It provides the central conceptual architecture through which the dissertation explains why Afghanistan's geographic centrality has not translated into functioning corridors since 2021.

The geopolitical lock-and-key model rests on three core components: (1) a structural lock generated by systemic and regional rivalries; (2) actor-specific political and security keys, defined as non-negotiable conditions for support or non-obstruction; and (3) a sovereign gatekeeper, Taliban-ruled Afghanistan, whose bounded agency shapes but does not fully determine outcomes. The interaction of these elements produces what the study terms managed dissociation: a stable but sub-optimal equilibrium of fragmented, selective connectivity rather than integrated corridor development.

The structural lock: a multi-tiered system of constraints

At the broadest level, the structural lock denotes a condition of sustained deadlock in which Afghanistan's connectivity potential is systematically suppressed by the interaction of great-power and regional strategies. Drawing on structural realism, the model assumes that major actors assess infrastructure projects not only according to their absolute economic benefits but also in terms of their impact on relative power and regional hierarchy [12, 13, 28]. When a project is expected to significantly strengthen a rival by granting it privileged access to markets, resources, or strategic depth, other actors deploy tools of statecraft to block, delay, or re-route it, even at the cost of foregoing mutual gains [7, 8, 25].

In the Afghan context, the structural lock is produced by three overlapping dynamics. First, the United States, China, and Russia promote partially incompatible corridor visions that either bypass Afghanistan or seek to limit the extent to which rivals can embed themselves there [8, 20, 22]. Washington's emphasis on sanctions, counter-terrorism benchmarks, and selective support for Chabahar-linked alternatives is shaped by both counter-terrorism and China- and Iran-related containment logics [9, 20, 21]. Beijing's BRI corridors through Pakistan and Central Asia are designed to secure westward access while avoiding over-dependence on U.S.-controlled maritime chokepoints and are pursued with sensitivity to sanctions exposure and investment protection risks [7, 25]. Moscow, for its part, promotes the INSTC and associated routes through Iran that largely circumvent Afghanistan, seeking to consolidate its own transit role and minimize Western leverage [8, 22].

Second, regional competition especially between Pakistan and India over port gateways and influence in Central Asia reinforces this lock. Pakistan's promotion of

Karachi and Gwadar as primary outlets for Central Asian trade is interwoven with its broader strategic rivalry with India, while India's investment in Chabahar and its connecting infrastructure is partly intended to bypass Pakistani territory and contest Islamabad's gatekeeping position [194, 197]. Under these conditions, a fully integrated, multi-actor trans-Afghan corridor risks re-allocating critical leverage over trade routes in ways that either Islamabad or New Delhi may perceive as unacceptable.

Third, the sanctions-based financial architecture surrounding Taliban-ruled Afghanistan further entrenches the lock. Asset freezes, restrictions on banking channels, and the threat of secondary sanctions raise the legal and reputational risks of large-scale engagement with Afghanistan, making multilateral lending and cross-border project finance exceptionally difficult [20, 21, 193]. Even actors willing in principle to work with Taliban-ruled Afghanistan must weigh exposure to U.S. and allied sanctions and anticipate possible shifts in international policy. Together, these systemic and regional dynamics create a structural environment in which attempts to "unlock" Afghanistan in favour of one actor generate counter-moves by others that restore fragmentation.

Empirically, the structural lock is visible in the pattern of stalled or truncated implementation of economically viable projects, the proliferation of rival bypass corridors, and the persistence of Afghanistan's marginal position in regional trade statistics despite its central location [23, 89, 90]. The UAP Railway, which would directly connect Central Asia to the Arabian Sea via Afghanistan and enjoys strong economic justification, remains unbuilt in its Afghan segment precisely because it is embedded in this multi-tiered rivalry over North-South transport axes [22, 23, 65].

Keys: non-negotiable political and security conditions

Within this structural lock, individual actors remain strategic agents with distinct interests, red lines, and instruments of influence. The model conceptualizes their core demands as keys: specific, often non-negotiable political, security, or normative conditions that must be met for an actor to actively support or at least cease obstructing an integrated connectivity project. Keys can include requirements related to sanctions relief, counter-terrorism guarantees, route choices, governance standards, human rights benchmarks, or investment protection and are calibrated to secure relative advantage or prevent relative loss rather than to maximize collective welfare.

In practice, keys in the Afghan case fall into three broad categories. Security keys encompass demands for counter-terrorism cooperation, assurances regarding the presence or exclusion of armed actors, and credible guarantees for the physical protection of investments and infrastructure [193]. Political keys cover recognition status, governance and rights conditionality, and the acceptance or rejection of ideological or institutional arrangements [20, 21, 184]. Sovereign-territorial keys relate to border issues, control over specific nodes and segments of corridors, and the allocation of transit rights and fees [8, 22].

The United States, for example, links any meaningful easing of financial restrictions or support for major projects to stringent counter-terrorism guarantees and governance benchmarks that Taliban-ruled Afghanistan is unwilling or unable to meet [20, 21, 193]. China demands high levels of security and investment protection for

projects such as Mes Aynak, as well as assurances that engagement will not expose Chinese firms and banks to secondary sanctions [133]. Russia prioritizes routes and institutional arrangements that consolidate its role in Eurasian transport and minimize Western regulatory influence, shaping its stance toward Afghanistan-linked initiatives [8, 22]. Regional actors add further conditions: Pakistan seeks to preserve and enhance its control over access to the Arabian Sea, while India insists on limiting Pakistani gatekeeping and maintaining independent access to Afghan and Central Asian markets, especially via Chabahar [194].

Crucially, many of these keys are mutually incompatible. Satisfying one actor's key often directly undermines another's preferences: meaningful sanctions relief and recognition for Taliban-ruled Afghanistan, for instance, may be perceived in Washington as undercutting leverage on human rights and counter-terrorism and in New Delhi as strengthening Pakistan-aligned forces, while still failing to provide sufficient legal certainty for Chinese or Russian investors [20, 21, 184]. The incompatibility of keys across actors generates what the model terms a mutual veto system, in which the alignment required for integrated corridors is structurally improbable. As a result, even when technical feasibility and economic viability are demonstrated, as in the case of the UAP Railway, the political and security keys do not align, and the project remains locked [22, 23].

The sovereign gatekeeper: bounded agency of Taliban-ruled Afghanistan

The third core component of the model is the sovereign gatekeeper. Building on work on de facto states and sovereignty as "organized hypocrisy," the model conceptualizes Taliban-ruled Afghanistan as a territorial authority that exercises effective control over borders and resources but operates under severe external and internal constraints [114, 196]. As gatekeeper, Taliban-ruled Afghanistan holds the proximate power to permit or deny physical passage and to authorize or obstruct the construction and operation of infrastructure, collecting customs revenues, issuing transit permits, signing memoranda of understanding, and providing (varying) security guarantees [140, 184].

Taliban-ruled Afghanistan possesses its own key: a demand for international recognition, sanctions relief, and acceptance of its ideological governance model. It explicitly links its willingness to provide stable access to territory and resources to progress on these fronts, framing transit and mining deals as pathways toward economic self-sufficiency, regime consolidation, and eventual normalization [140]. In principle, this gatekeeping position grants the Taliban significant bargaining power, since no major trans-Afghan corridor or large-scale resource extraction project can proceed without at least tacit cooperation from the authorities in Kabul [141, 185].

In practice, however, the gatekeeper's agency is sharply bound. Externally, sanctions, frozen assets, and non-recognition severely constrain access to multilateral finance, insurance, and international payment systems, and expose potential partners to legal and reputational risks [20, 21, 193]. Internally, ideological commitments, governance practices, and intra-Taliban factionalism restrict the kinds of concessions Taliban-ruled Afghanistan can credibly make on issues such as counter-terrorism

cooperation, inclusive governance, women's rights, and the protection of cultural heritage sites such as those at Mes Aynak [141, 185].

The result is a gatekeeper's dilemma. Taliban-ruled Afghanistan can use its control over territory to negotiate selective, bilateral deals, for example on mining or transit with actors willing to accept the sanctions environment and ideological constraints [140]. However, it cannot independently orchestrate the alignment of the multiple external keys necessary for integrated, multilateral corridors, since key great powers and financial institutions retain vetoes by controlling sanctions levers, financing channels, and alternative routes. Taliban-ruled Afghanistan's gatekeeping function thus introduces additional complexity into the geopolitical lock: its own demands constitute another key that must be aligned, and its governance practices influence how external actors perceive risk, but its capacity to alter the broader structural lock is limited [183, 184].

The empirical analysis in Chapter 3 shows that Taliban-ruled Afghanistan's gatekeeping position enables selective, bilateral agreements on mining and transit but does not allow it to unilaterally unlock integrated corridors, reinforcing the claim that its agency is real but bounded within the geopolitical lock.

Managed dissociation as the likely equilibrium

The combined effect of the structural lock, incompatible keys, and bounded gatekeeper agency is the emergence of managed dissociation as the most plausible equilibrium for Afghanistan's connectivity in the medium term. As outlined in the Introduction, managed dissociation refers to a condition of selective, fragmented connectivity in which limited, sector-specific, and often bilateral arrangements coexist with broader strategic isolation and the absence of integrated corridor regimes [25, 27]. Rather than full unlocking or complete isolation, the outcome is a calibrated pattern of under-connection, designed by external actors to extract specific benefits while denying Taliban-ruled Afghanistan the capacity to leverage its geography for substantial political or economic gains [8, 20, 25].

In such an equilibrium, narrow mining or energy deals, limited cross-border electricity exchanges, or short-segment rail and road links may proceed, often under ring-fenced financial and legal arrangements that minimize spillover into broader recognition or integration [23, 26]. Afghanistan may export copper or other minerals along highly controlled corridors, collect transit fees on selected routes, or participate in piecemeal energy swaps, but these connections remain isolated from larger regional frameworks and are vulnerable to pauses or reversals under external pressure [141, 185]. Projects like CASA-1000's ring-fenced Afghan section or the long-running but stalled Mes Aynak concession illustrate how connectivity can be tightly constrained and compartmentalized rather than scaled up into integrated networks [23, 133]. This expectation is assessed empirically in Chapter 3 and then evaluated against alternative scenarios of sustained deadlock and partial unlocking in Chapter 4, which shows that managed dissociation best fits observed bargaining patterns across UAP, Mes Aynak, and ring-fenced projects such as CASA-1000.

For external actors, managed dissociation offers a way to reconcile competing objectives: they can avoid fully ceding economic space to rivals by allowing limited

engagement, while preserving key elements of the structural lock that prevent Afghanistan from becoming a strategically autonomous, well-connected transit hub [8, 20, 25]. For Taliban-ruled Afghanistan, managed dissociation provides some revenue and diplomatic contact but falls far short of the transformative connectivity narrative often invoked in official discourse [140]. The geopolitical lock-and-key model therefore predicts that, absent a major shift in great-power relations or a fundamental change in Taliban-ruled Afghanistan's status and behaviour, Afghanistan is likely to remain in a state of managed dissociation rather than transition to either full integration or complete isolation.

This section has specified the conceptual architecture of the geopolitical lock-and-key model. The next section, 1.4, translates these component structural lock, keys, sovereign gatekeeper, and managed dissociation into observable indicators and links them directly to the research question, central hypothesis, and case selection strategy that structure the empirical chapters on the UAP Railway and Mes Aynak.

The scientific novelty of the geopolitical lock-and-key model can now be stated precisely. It lies in the explicit combination of four elements that existing approaches treat separately rather than as a single, testable configuration: a structural lock sustained by rival corridor strategies and sanctions regimes; actor-specific keys that encode mutually incompatible political and security conditions; a sovereign gatekeeper whose bounded agency is analytically central rather than residual; and an empirically observable equilibrium of managed dissociation. Structural realism supplies the relative-gains logic but does not specify the project-level mechanism of blockage; weaponized interdependence explains how hub states exploit network centrality but not how multiple rivals and a non-recognized territorial authority jointly immobilize a corridor space; geoeconomic and strategic-denial accounts describe instruments of statecraft but not the equilibrium those instruments produce. The model's distinct contribution is the causal mechanism itself: connectivity remains locked when, and because, the keys demanded by systemic powers, regional rivals, and the gatekeeper cannot be satisfied simultaneously, a mechanism that generates falsifiable expectations about which projects stall, which narrow bargains proceed, and under what conditions partial unlocking could occur.

1.4 Operationalizing the Frame: Indicators, Outcome Benchmarks, and the Geopolitical Rivalry Matrix

To move from conceptual architecture to empirical explanation, the geopolitical lock-and-key model must be translated into observable indicators that can be systematically traced across the dissertation's core cases. This section specifies how the model's main elements the structural lock, actors' keys, the sovereign gatekeeper, and the outcome of managed dissociation are operationalized, and explains how these indicators inform case selection, process-tracing strategies, and the Geopolitical Rivalry Matrix, which is formally introduced in this section as the model's core operational instrument.

Indicators of the structural lock

The structural lock is defined as a condition of sustained deadlock in which Afghanistan's connectivity potential is actively suppressed by great-power and

regional rivalries rather than merely by domestic fragility or technical constraints. Empirically, the structural lock is identified through a combination of outcome, behaviour, and discourse indicators.

Key outcome indicators include:

- Stalled or truncated projects despite demonstrated feasibility and economic rationale, such as the UAP Railway remaining unbuilt in its Afghan segment despite ADB assessments of economic viability and repeated political endorsements [23, 65].
- Persistent under-realization of trade and transit potential, evidenced by low volumes and high volatility of Afghan transit flows relative to estimated potential and comparative routes [89, 90, 91].

Behavioural and discourse indicators include:

- Competing corridor promotion and route diversion, such as the advancement of INSTC-linked routes through Iran and the promotion of Chabahar and Gwadar as alternative gateways that bypass or minimize Afghan segments [8, 22, 194].
- Use of sanctions, financing decisions, and diplomatic pressure to constrain engagement with Afghanistan, including asset freezes, restrictions on banking channels, and explicit warnings about sanctions exposure for firms contemplating major investments [20, 21, 193].
- Explicit zero-sum framing of connectivity in official and policy discourse, where corridor choices are presented as strengthening or weakening states' influence rather than as neutral economic opportunities [7, 8, 25].

These indicators allow the structural lock to be traced across time and across the UAP and Mes Aynak cases in Chapter 3, and to be distinguished from explanations that attribute deadlock primarily to domestic governance or capacity deficits, before being evaluated synthetically in Chapter 4.

Indicators of keys: mapping non-negotiable conditions.

Actors' keys are operationalized as specific, often explicit, conditions that states or the gatekeeper articulate as prerequisites for supporting, or ceasing to obstruct, major connectivity projects. They are primarily identified through documentary and process-tracing evidence of conditionality, bargaining breakdowns, and deal design.

Observable indicators include:

- Formal conditionality statements in sanctions regimes, policy documents, and public diplomacy (for example, U.S. requirements for counter-terrorism cooperation and governance benchmarks as preconditions for significant sanctions relief or financial normalization) [20, 21, 193].
- Contractual clauses and negotiation records that link financing, implementation, or risk-sharing arrangements to security guarantees, legal protections, or specific routing decisions [23].
- Reported causes of bargaining impasses, where actors cite the failure to meet political or security demands as reasons for delaying or withdrawing from projects [22].

Substantively, keys are coded into the categories introduced in Section 1.3: security keys (for example, counter-terrorism cooperation, exclusion of specific armed groups, protection of personnel and assets), political keys (for example,

recognition status, governance and human rights conditions), and sovereign-territorial keys (for example, control over specific segments and ports, allocation of transit rights and fees) [8, 20, 22].

Analytically, these keys are organized into the Geopolitical Rivalry Matrix introduced below, which codes each actor's demands and traces where they align or conflict; the matrix is applied to the regional actor landscape in Chapter 2 and to the UAP and Mes Aynak cases in Chapter 3, providing the basis for the cross-case synthesis in Chapter 4. The presence of mutually incompatible keys for example, U.S. expectations of behavioural change and continued sanctions versus Taliban-ruled Afghanistan's insistence on recognition and sanctions relief, or Chinese risk-aversion regarding sanctions clashing with U.S. enforcement priorities is treated as a central mechanism sustaining the lock [20, 21, 184].

Indicators of sovereign gatekeeper agency

The sovereign gatekeeper component focuses on Taliban-ruled Afghanistan's bounded but significant role in shaping connectivity outcomes. Gatekeeper agency is operationalized through indicators of territorial control, fiscal and regulatory capacity, bargaining behaviour, and the limits imposed by sanctions and ideology [114, 184].

Key indicators include:

- Territorial and administrative control, such as the absence of competing authorities across most of Afghanistan, the ability to operate border posts, and the collection of customs and transit revenues [193].
- Formal and informal engagement in corridor and resource negotiations, evidenced by memoranda of understanding, feasibility studies, and public statements regarding projects such as UAP, Mes Aynak, and other mining or transit arrangements [23, 140].
- Exercise of veto or consent, documented through cases where Taliban-ruled Afghanistan's security guarantees, permitting decisions, or bargaining positions directly enable, modify, or stall project components [141, 185].
- Constraints arising from sanctions and ideology, including evidence that potential partners cite sanctions exposure, banking restrictions, or concerns about governance and rights as reasons for limiting or structuring engagement in narrow, ring-fenced ways [20, 21, 193].

Within the model, Taliban-ruled Afghanistan's own key its demand for recognition, sanctions relief, and acceptance of its governance model is also coded and traced. The empirical chapters assess how these key shapes negotiations, and how far Taliban-ruled Afghanistan can leverage its gatekeeping position to secure piecemeal gains in an environment where it lacks control over the broader structural lock [183, 184].

The Geopolitical Rivalry Matrix as the model's operational instrument

To synthesize these elements, the dissertation introduces here its core operational instrument: the Geopolitical Rivalry Matrix. The matrix arrays the main actors involved in Afghanistan's post-2021 connectivity politics along one axis, ordered by level of analysis (systemic lock-holders; regional rivals and neighbouring states; and the Taliban gatekeeper), and codes, along the other, the dimensions specified by the

model: primary goals, rivals, leverage tools, preferred projects, red lines, and unlocking conditions ("keys") [20-22]. Coding draws on official strategies and policy documents, project records, elite interviews (A1-A3), expert interviews (E1-E5), and the expert survey (R1-R14); the matrix's analytical function is to locate where actors' keys align and, crucially, where they intersect as mutual vetoes. Formally introduced here as part of the model's operationalization, the matrix is populated with empirical content in Chapter 2 (Section 2.4), guides the case analyses in Chapter 3, and is reproduced in full in Appendix A (Tables A.2 and A.4).

Indicators of managed dissociation vs. unlocking vs. isolation

To evaluate the model's expectations about outcomes, the dissertation distinguishes empirically between three connectivity end-states: unlocking, complete isolation, and managed dissociation, each associated with distinct patterns of infrastructure development, financing, and cross-border flows.

Unlocking is operationalized as:

- Construction and operation of major trans-Afghan corridor segments (for example, significant progress on UAP rail infrastructure inside Afghanistan).
- The presence of multilateral financing arrangements and joint governance frameworks involving multiple great powers, regional actors, and financial institutions.
- Sustained, high-volume trade and energy flows across Afghan territory, documented in customs and trade statistics, with low disruption rates over a period of at least two years [23, 89, 90].

Complete isolation would be indicated by:

- A near-absence of new cross-border infrastructure projects involving Afghanistan.
- Minimal formal engagement with Taliban-ruled Afghanistan on transit or resource extraction.
- Very low levels of recorded trade and transit flow relative to regional benchmarks, driven almost exclusively by humanitarian or informal channels [89, 90, 91].

Managed dissociation, by contrast, is identified when:

- Connectivity takes the form of narrow, bilateral, or sector-specific arrangements, such as ring-fenced mining or energy deals, which do not scale into integrated corridor systems [23].
- Projects are designed and financed in ways that minimize legal and sanctions exposure, with limited use of multilateral banking channels and a strong reliance on ad hoc or state-to-state mechanisms.
- Engagement with Afghanistan coexists with continued investment in bypass routes and rival gateways (for example, INSTC, Chabahar, Gwadar), indicating that external actors are deliberately avoiding over-reliance on Afghan corridors [8, 22, 194].
- Implemented projects remain vulnerable to pauses or reversals under external pressure, and are not embedded in robust, rules-based regional governance frameworks [23, 26].

By specifying these indicators, the dissertation can empirically test whether the observed pattern in UAP and Mes Aynak corresponds more closely to unlocking,

isolation, or managed dissociation, thereby evaluating the central claim that the geopolitical lock produces a stable but fragmented equilibrium.

Linking indicators to cases and methods.

These operational definitions directly inform the dissertation's case selection and process-tracing strategy. As outlined in the Introduction and Methodology chapter, the UAP Railway and Mes Aynak are selected as theory-guided cases that illuminate different dimensions of the geopolitical lock-and-key model [23, 31, 32].

The UAP Railway is treated as a most-likely case for integrated unlocking under functionalist assumptions, given its strong economic rationale and political support, but unfolds within the heart of the structural lock and thus serves to test Corollary 1 (Great Power Deadlock) and the operation of incompatible keys at the systemic and regional levels [20, 22, 23].

Mes Aynak is selected as a critical case for examining gatekeeper agency and sanctions-mediated geoeconomics: it is a high-value resource project with clear mutual incentives for both Taliban-ruled Afghanistan and China, yet remains constrained by the broader lock, providing leverage for testing Corollary 2 (Gatekeeper's Constrained Agency) and Corollary 3 (Managed Dissociation) [133].

Across both cases, the indicators specified above guide the structured collection and interpretation of primary documents, elite interviews, and secondary sources, allowing the dissertation to trace how structural constraints, keys, and gatekeeper behaviour interact over time [31, 32, 36]. This operationalization ensures that the geopolitical lock-and-key model is not merely a descriptive metaphor but a falsifiable analytical framework: its claims about mechanisms and outcomes can be systematically confirmed or disconfirmed through empirical evidence from UAP, Mes Aynak, and related bargaining episodes.

Taken together, the operationalization of the structural lock (L-indicators), keys (K-indicators), sovereign gatekeeper (G-indicators), and managed dissociation (outcome benchmarks) provides the empirical backbone for the dissertation's process-tracing design [36]. These indicators specify what counts as evidence of the geopolitical lock-and-key mechanisms in action and how such evidence will be identified in primary documents, official statements, and project-level chronology across the UAP Railway and Mes Aynak cases.

Chapter 3 applies this framework to the UAP Railway as a most-likely case for functionalist expectations that nonetheless remain stalled, allowing close examination of how competing great-power corridor visions and mutually exclusive keys generate a structural lock along the Central Asia-South Asia axis [20, 22, 23]. The same chapter then turns to Mes Aynak to probe the limits of sovereign gatekeeper agency under sanctions and non-recognition, assessing whether observed bargaining patterns and project outcomes align with the managed dissociation equilibrium posited in Corollary 3 or suggest alternative dynamics [133]; Chapter 4 then synthesizes the two cases and evaluates the model against alternative explanations. By linking clearly specified indicators to detailed causal narratives, the dissertation operationalizes the geopolitical

lock-and-key model in a manner consistent with contemporary standards of qualitative inference in International Relations and comparative politics [29, 31].

2: ACTORS, INTERESTS, AND POTENTIAL OF AFGHANISTAN'S CONNECTIVITY

This chapter translates the geopolitical lock-and-key model into an actor-centred map of Afghanistan's post-2021 connectivity environment. It identifies the main systemic, regional, and gatekeeper actors, clarifies their core interests and instruments, and specifies the political and security keys each demands before supporting or ceasing to obstruct major corridor projects linking Central Asia to the Indian Ocean [8, 22]. Rather than offering comprehensive country histories, the chapter focuses only on those elements of each actor's strategy that directly shape trans-Afghan connectivity and the structural lock.

The analysis proceeds across three levels that mirror the theoretical framework in Chapter 1. At the systemic level, it examines the United States as financial and normative lock-holder, China as cautious investor and corridor builder, and Russia as Eurasian security broker promoting alternative routes such as the INSTC [7, 128]. At the regional level, it analyses Pakistan as an anxious patron and Arabian Sea gatekeeper, India as a contained contender and Chabahar strategist, Iran as a pragmatic but sanctions-constrained outlet, and Afghanistan's Central Asian neighbours, especially Uzbekistan, with reference to Kazakhstan and Turkmenistan as proactive connectors seeking diversified access [9, 20, 21]. At the gatekeeper level, it considers Taliban-ruled Afghanistan, emphasizing its ideological orientation, governance constraints, and strategy of leveraging territorial control for revenue and incremental recognition under sanctions [184].

The chapter concludes by populating the Geopolitical Rivalry Matrix, introduced in Section 1.4, with these profiles, systematically coding each actor's goals, tools, red lines, and keys. This matrix provides the structured empirical backdrop for the subsequent case studies the UAP Railway and Mes Aynak case studies in Chapter 3 and allows the dissertation to trace how overlapping rivalries and incompatible keys sustain Afghanistan's geopolitical lock and favour managed dissociation over integrated unlocking [10, 141, 142].

A focused comparison of the three systemic-level lock-holders (United States, China, Russia) by tools, key conditions, preferred routes, and project implications for UAP and Mes Aynak is provided in Table A.4 in Appendix A.

2.1 Great powers as lock-holders

At the systemic level, Afghanistan's connectivity landscape is shaped primarily by the strategic behaviour of the United States, China, and Russia as great-power lock-holders. The United States exerts outsized influence through its control of sanctions, Afghan foreign reserves, and access to dollar-denominated finance, functioning as a financial and normative gatekeeper for any large-scale project involving Afghanistan [20, 24]. China approaches Afghanistan as a potential extension of the BRI and the China-Pakistan Economic Corridor, combining resource and corridor ambitions with a

cautious, security-driven investment posture [7, 133]. Russia, in turn, seeks to manage regional security through the Collective Security Treaty Organization while promoting the INSTC and related routes as alternatives that can partly incorporate, but also bypass, Afghan territory [8, 198, 199]. Together, these actors define the outer structural parameters of the geopolitical lock within which regional states and the Taliban gatekeeper must operate [22].

United States: financial and normative lock-holder.

Since the Taliban takeover in August 2021, the United States has operated as the primary financial and normative lock-holder in Afghanistan, using its central role in the global financial system and its counterterrorism sanctions regime to shape the environment for any large-scale connectivity initiative [20, 24]. The core objectives of U.S. policy have been to prevent the re-emergence of a transnational terrorist sanctuary, to limit the strategic gains of adversaries such as China and Russia, and to retain leverage over the Taliban regime without extending formal recognition [20, 200, 201]. Washington's main instruments in pursuit of these aims include targeted sanctions, control over Afghan foreign reserves held abroad, and influence within international financial institutions.

A central pillar of this lock is the treatment of Afghanistan's central bank reserves and broader banking access. Following the Taliban's return to power, the United States froze several billion dollars in Da Afghanistan Bank's foreign assets, including funds held at the Federal Reserve Bank of New York. In 2022, Washington and its partners established the Swiss-based Fund for the Afghan People ("Afghan Fund") and transferred around 3.5 billion USD of these reserves into it, with a mandate to support Afghanistan's macroeconomic and financial stability through targeted disbursements while keeping resources outside Taliban control [202, 203, 204]. Executive orders and subsequent decisions have repeatedly extended the freeze on Da Afghanistan Bank's U.S.-based assets, reflecting a deliberate strategy of preserving financial leverage over the Taliban while attempting only partially successfully to mitigate humanitarian fallout [203, 205, 206].

In parallel, the OFAC has issued general licences, FAQs, and humanitarian fact sheets intended to insulate humanitarian assistance and basic commercial activity from counterterrorism sanctions in Afghanistan [200, 201, 207]. Formally, these authorizations permit certain transactions related to food, medicine, and other basic needs, and official FAQs stress that sanctions on the Taliban and the Haqqani Network do not per se prohibit humanitarian aid, provided that assistance complies with the relevant general licences [200, 201]. Empirical studies and NGO reports nonetheless underline extensive de-risking and over-compliance among banks and firms, which often avoid Afghan-linked transactions entirely due to perceived legal and reputational risks [208, 209]. Even where activities are technically licensed, this "chilling effect" further entrenches Afghanistan's isolation from conventional trade finance and investment channels, exemplifying how U.S. dominance over key nodes in the global financial network turns the technical "plumbing" of finance into an infrastructural lock consistent with accounts of weaponized interdependence [30, 195].

Within the geopolitical lock-and-key framework, the United States' principal tools are therefore financial and regulatory rather than territorial. U.S. influence over dollar clearing, correspondent banking relationships, and multilateral lending decisions allows Washington to raise the cost and risk of engaging in trans-Afghan projects such as the UAP Railway or large-scale mining ventures at Mes Aynak, even when the United States is not a direct participant in those projects [23, 141, 142]. For other states and firms, any serious involvement with a non-recognized, Taliban-run Afghanistan must be weighed against potential loss of access to U.S. financial markets and exposure to sanctions enforcement, making U.S. policy a systemic constraint that shapes the calculations of all other actors [24].

U.S. keys the conditions Washington demands before easing this lock are explicitly political and security-centric. Official strategy documents and congressional reporting link significant normalization or sanctions relief to verifiable counterterrorism guarantees, demonstrable severing of ties to groups such as Al-Qaeda, measurable progress on human rights (especially women's and girls' rights), and steps toward a more inclusive political order [20]. These demands extend well beyond the narrow technical requirements of corridor operation and are difficult for the Taliban to satisfy without undermining core ideological commitments and internal cohesion [185]. In the Geopolitical Rivalry Matrix, the United States thus appears as a lock-holder whose key comprehensive behavioural and normative change by the gatekeeper is broad and stringent, making convergence with Taliban-ruled Afghanistan's own demands for recognition and sanctions relief highly unlikely in the short to medium term.

For Afghanistan specifically, U.S. financial and normative gatekeeping means that no large-scale connectivity project, whether the UAP Railway, Mes Aynak, or the energy corridors discussed below, can be financed through dollar-linked institutions without a prior change in the sanctions and recognition environment. This is not an incidental obstacle: it is the structural condition within which every Afghan connectivity initiative must operate, making U.S. policy the outermost constraint on Afghanistan's role as a corridor state.

Elite and expert respondents broadly confirm that U.S. and wider Western policy remain structured around sanctions and conditional engagement rather than any proactive connectivity strategy in Afghanistan. Survey participants repeatedly identify economic sanctions and financial isolation as major obstacles to foreign investment in trans-Afghan projects, even when they acknowledge improved physical security compared to the NATO era (R1, R3, R7, R8). Regional experts likewise describe Western actors as prioritizing counterterrorism assurances and human rights benchmarks over corridor development, and several stress that unfreezing Afghan assets and easing sanctions are politically difficult in Washington, especially under a Trump administration (E1, E3, E4). These perceptions corroborate the coding of U.S. keys as a combination of counterterrorism guarantees and governance concessions, with sanctions relief treated as a powerful lever rather than an automatic response to improved security.

In the Geopolitical Rivalry Matrix, the United States therefore appears as the principal systemic lock-holder: its broad security-normative key makes convergence with Taliban-ruled Afghanistan's key of recognition and sanctions relief highly improbable, and its control over financial infrastructure steers all other actors toward narrow, ring-fenced engagements, reinforcing managed dissociation rather than integrated corridors.

China: cautious investor and corridor builder

China approaches Taliban-ruled Afghanistan as both a potential connectivity hub and a significant security risk. Beijing portrays Afghanistan as a prospective link in the westward extension of the BRI, particularly through the China–Pakistan Economic Corridor (CPEC) and Gwadar port, while simultaneously emphasizing counterterrorism concerns and the need to contain perceived threats emanating from groups linked to Xinjiang [210, 211]. Since 2021, Chinese officials have repeatedly signalled willingness to deepen economic engagement and integrate Afghanistan into BRI frameworks, but actual commitments have remained cautious, incremental, and heavily conditioned on security guarantees and investment protection [212-214].

Beijing's core goals in Afghanistan combine security, economic, and geopolitical dimensions. On the security side, China seeks to prevent the use of Afghan territory by militant groups such as the East Turkestan Islamic Movement (ETIM) and to ensure that instability does not spill over into Xinjiang or Central Asia [211, 213, 215]. Economically, Chinese state-owned and private firms view Afghanistan's mineral deposits, including copper at Mes Aynak and other critical resources, as long-term opportunities that could complement China's broader strategy of securing supply chains for the energy transition [140, 216, 217]. Geopolitically, incorporating Afghanistan at least symbolically into BRI and CPEC supports Beijing's narrative of shaping Eurasian connectivity and offers a potential overland complement to routes through Pakistan and Central Asia [218-220].

Interview and survey data support the depiction of China as a primarily economic actor whose cooperation hinges on security guarantees and manageable sanctions risk rather than normative conditions. Regional experts highlight that Beijing does not condition engagement on inclusivity or human rights but is acutely concerned about the presence of Uighur militants and the risk of attacks on Chinese workers and infrastructure (E2, E3). Several respondents note an informal understanding whereby the Taliban move ETIM fighters away from the Chinese frontier and prevent cross-border attacks as a de facto red line for continued Chinese involvement (R5, R6). At the same time, experts emphasize that the lack of railway links from Mes Aynak and fear of secondary sanctions have made Chinese companies cautious, reinforcing the coding of China's keys as security assurances for ETIM and infrastructure, plus a tolerable sanctions environment rather than full normalization of the Emirate.

Chinese officials and Taliban representatives have since 2023 made several high-profile announcements about Afghanistan's participation in BRI and the extension of CPEC northward. Trilateral statements with Pakistan and Taliban-ruled Afghanistan highlight plans for "infrastructure connectivity, trade facilitation, counter-terrorism cooperation, and energy cooperation," while media reports emphasize Afghanistan's

prospective role as a “land-linked” rather than “land-locked” state in Chinese discourse [221-223]. Beijing has also taken steps such as granting zero customs duties on a large share of Afghan products and endorsing exploratory work on possible rail and road links from Pakistan into eastern Afghanistan [218]. These moves fit China’s broader pattern of using infrastructure projects and preferential trade arrangements to deepen economic and political ties along BRI corridors.

However, China’s actual economic engagement in Taliban-ruled Afghanistan has been measured and risk-averse. Analyses stress that, despite rhetorical support and some new contracts including in oil and smaller-scale infrastructure China has not launched the kind of large, capital-intensive projects that characterize CPEC inside Pakistan [133, 224]. Security threats against Chinese nationals, uncertainty over the Taliban’s ability to protect foreign assets, and the reputational and legal risks of investing in a non-recognized regime under U.S. and UN sanctions have driven a pattern of cautious, bilateral experimentation rather than full-scale corridor construction [133, 225]. The extension of CPEC into Afghanistan remains largely at the level of memoranda, feasibility discussions, and pilot initiatives, rather than operational infrastructure.

The Mes Aynak copper project illustrates both China’s strategic interest and its caution. The MCC first secured a multibillion-dollar concession at Mes Aynak in 2008, but extraction has been repeatedly delayed due to security conditions, contractual disputes, and archaeological concerns [226, 227]. Under Taliban rule, Chinese and Taliban-ruled Afghanistan officials have staged ceremonies marking the start of road construction to the site and declared a “new phase” of cooperation, yet analysts note that full-scale mining is unlikely before the mid-2020s and will depend on sustained security and workable financial arrangements under the prevailing sanctions regime [140, 228]. Mes Aynak thus functions as a test case of whether Beijing is willing and able to move from symbolic engagement to high-risk, high-reward investment in a pariah state.

Within the geopolitical lock-and-key model, China’s main tools in Afghanistan are selective investment, diplomatic recognition moves short of full formal recognition, and participation in trilateral forums with Pakistan and Taliban-ruled Afghanistan. Beijing offers the prospect of infrastructure finance, resource contracts, and market access, but deploys these instruments in a deliberately incremental way, sequencing commitments to the Taliban’s performance on security and stability [133, 229, 230]. At the same time, China benefits to some extent from the existing U.S.-led sanctions lock, which limits Western competition for projects while leaving space for carefully calibrated Chinese entry.

China’s keys are narrower and more transactional than those of the United States but still difficult for the Taliban to fully satisfy. Beijing consistently demands robust security guarantees for Chinese personnel and assets, effective suppression of groups it associates with threats to Xinjiang, and credible assurances that contracts and concessions will be honoured over time [218, 229]. It also requires a minimum level of predictability in Afghanistan’s regulatory and political environment to justify major capital outlays by state-owned enterprises [133]. In the Rivalry Matrix, China therefore

appears as a cautious corridor builder whose keys security assurances, investment protection, and a manageable reputational risk profile can in principle be met through bilateral bargaining, but whose actual behaviour to date has reinforced a pattern of fragmented, project-specific engagement rather than integrated corridor development.

For Afghanistan, China's cautious posture means that Taliban-ruled Afghanistan cannot treat Beijing as a reliable underwriter of large-scale corridor infrastructure. Chinese engagement at Mes Aynak and in BRI-linked discussions has delivered diplomatic visibility and limited preparatory activity but has not translated into the sustained capital flows or institutional guarantees that would allow Afghanistan to develop its mineral wealth or build the rail infrastructure needed for corridor integration. The Afghan implication of Chinese strategic hedging is that the country remains dependent on a partner that benefits from keeping options open rather than from committing irreversibly.

In matrix terms, China occupies the position of a conditional lock-holder: its keys of security guarantees, contract protection, and manageable reputational risk are narrower than Washington's but remain unmet, so Beijing's behaviour, incremental, reversible, and compartmentalized, reproduces managed dissociation at the project level rather than loosening the structural lock.

Russia: Eurasian security broker and corridor shaper

Russia views Afghanistan primarily through the lens of regional security management and sanctions-driven geoeconomic adjustment. Since 2021, Moscow has sought to position itself as a security provider for Central Asia while simultaneously exploring ways to integrate Afghanistan into its flagship INSTC and related transit schemes linking Russia to South Asia [231-233]. This dual role as security broker and corridor architect frames Russia's place in the geopolitical lock surrounding Afghan connectivity.

Expert interviews suggest that, in practice, Russia is only a secondary player in Afghan connectivity compared to China and regional neighbours. One regional specialist explicitly argues that Moscow is preoccupied with the war in Ukraine and prioritizes the INSTC route through Iran and the Caspian over any serious investment in Afghan rail or energy projects (E2). Other respondents mention Russia mainly as part of a broader BRICS or Global South bloc vis-à-vis the West, rather than as an actor actively contesting specific corridors inside Afghanistan (R5, R7). This supports the coding of Russia's key interests as preserving influence over North-South routes via Iran while avoiding high-cost, high-risk projects in Afghanistan itself, thereby contributing indirectly to the lock by favouring alternatives over trans-Afghan integration.

On the security side, Russian strategy emphasizes containing spillover risks from Afghanistan and preventing the emergence of hostile militant groups along the southern flank of the Collective Security Treaty Organization. The 2023 Russian Foreign Policy Concept and subsequent statements highlight Central Asia as a priority region, with explicit references to threats emanating from Afghan territory [234]. Through the CSTO, Russia has led exercises such as "Rubezh" focused on defending the Tajik-Afghan border and has used the Moscow Format consultations on

Afghanistan to convene regional stakeholders for coordinated messaging on counterterrorism and narcotics [223, 234]. Russian officials have also signalled willingness to reconsider the Taliban's designation status in Russian law to facilitate security cooperation against Islamic State Khorasan Province (ISKP) and related groups [235, 236].

On the economic and connectivity side, Russia's interest in Afghanistan has intensified as Western sanctions following the 2022 invasion of Ukraine have pushed Moscow to reorient trade flows away from Europe. The INSTC, a multimodal network linking Russia to Iran and India through several routes, has been elevated as a key alternative to the Suez Canal and to westward energy corridors [198, 199, 237]. Recent reporting shows Russian planners explicitly framing a trans-Afghan railway connection toward Pakistan as a prospective "fourth branch" of INSTC, complementing the existing western, trans-Caspian, and eastern legs [238, 239, 240]. In this vision, rail arteries through Kazakhstan and Turkmenistan into Afghanistan, and onward to Pakistani ports, would provide Russia with additional access to "warm-water" outlets and diversify away from chokepoints in the Persian Gulf [231-233].

Practical steps in this direction have emerged in the context of the broader Trans-Afghan Corridor. Russian officials have participated in discussions with Uzbekistan, Kazakhstan, and Turkmenistan on rail routes that would connect Central Asia to Pakistan via Afghan territory, and Russian transport authorities have launched feasibility work on freight volumes and potential investments [238-240]. Moscow has also expanded oil and fuel shipments southward using Afghan transit, treating Afghanistan as one of several potential land bridges to South Asian and Middle Eastern markets [231]. While these initiatives remain in early stages, they signal Russia's intention to weave Afghanistan into a sanctions resilient logistics network centred on INSTC and complementary Eurasian routes.

Within the geopolitical lock-and-key framework, Russia's tools combine security institutions and corridor promotion. Through the CSTO and bilateral military ties, Moscow offers border protection, exercises, and security assistance to Central Asian states, reinforcing its role as guarantor against instability "from the south" [234]. Through INSTC and related rail projects, it promotes an alternative connectivity vision that in many instances routes trade around rather than through Afghanistan or incorporates Afghanistan only as a tightly controlled segment within a Russia–Iran–India axis [198, 199, 232]. These instruments allow Russia to influence whether and how trans-Afghan corridors proceed, and to ensure that any such projects align with its broader goal of reducing dependence on Western-controlled routes and balancing Chinese influence in Eurasia [241].

Russia's keys are centred on security assurances and role recognition. Moscow expects the Taliban authorities to prevent the use of Afghan territory by groups threatening Russian and Central Asian security, to cooperate (formally or informally) on counterterrorism, and to accept Russia's leadership role in regional security formats such as the CSTO and the Moscow Format [234]. At the same time, Russian planners seek corridors that do not significantly undercut Russia's own leverage for example, by ensuring that new North-South routes reinforce, rather than bypass, Russia's

position in Eurasian trade flows [198, 199]. In the Rivalry Matrix, Russia therefore appears as both a potential facilitator and a gatekeeper: willing to support trans-Afghan infrastructure when it strengthens INSTC and Russian strategic depth but prepared to slow or redirect projects that would privilege competitors or weaken its security perimeter.

For Afghanistan, Russia's conditional facilitation produces an asymmetric situation: Russian officials endorse Trans-Afghan rail projects in multilateral forums, and Russian transport authorities have commissioned freight forecasts, yet the corridor Russia actually wants, one embedded in INSTC and reinforcing Russian Eurasian leverage, is not necessarily the one that maximizes Afghan transit revenue or integrates Afghan markets most effectively into South Asian trade. The Afghan segment thus risks being shaped by Russian routing preferences rather than Afghan economic interests, reinforcing the dissertation's broader finding that external actors' support for Afghan connectivity is systematically conditioned on corridor geometries that serve their own strategic priorities first.

Within the matrix, Russia functions as a route-shaping lock-holder: its keys of security cooperation and preserved Eurasian leverage are compatible with selective trans-Afghan engagement but not with corridor configurations that would bypass Russian-controlled geometry, so Moscow's posture channels connectivity toward variants that sustain fragmentation rather than dissolve it.

The European Union and Gulf States: Normative Constraint and Financial Workaround

Two further actors shape Afghanistan's post-2021 connectivity environment without appearing prominently in mainstream corridor analysis: the European Union and the Gulf Cooperation Council states, particularly the United Arab Emirates and Qatar. Though neither holds the territorial or military leverage of the United States, China, or Russia, each exerts a structurally important influence on the financial plumbing and normative framing of Afghan connectivity.

The EU's primary instrument is its own autonomous sanctions regime, which mirrors and in some respects supplements U.S. measures. Following the August 2021 transition, the EU introduced restrictive measures targeting Taliban leadership and designated entities, froze development assistance channelled through state institutions, and adopted policy positions linking any normalized engagement to conditionality on women's rights, inclusive governance, and counterterrorism [242, 243]. Like the U.S. regime, EU measures have generated a chilling effect among European financial institutions and construction firms that extends well beyond formally designated individuals or entities. European banks with Afghan operations have substantially reduced their exposure, and European export credit agencies have declined to underwrite Afghan-segment infrastructure even where U.S. licences are technically available [20, 21, 244]. In the Geopolitical Rivalry Matrix (Table 2.1), the EU therefore appears as a normative reinforcer of the lock: its conditions are broadly aligned with those of the United States, adding a second layer of financial and reputational constraint. Expert interviewees E1, E2, and E3, all based in Kazakhstan, consistently noted that EU derisking behaviour compounds U.S. sanctions, making it difficult even

for Central Asian firms with no direct U.S. exposure to source equipment and insurance from European suppliers for Afghan infrastructure projects.

The Gulf states occupy the opposite end of this spectrum. The United Arab Emirates and Qatar have emerged as informal hubs for Afghan financial flows, diplomatic contacts, and business facilitation that bypass both Western sanctions constraints and the formal non-recognition problem. Taliban officials maintain working relationships with UAE and Qatari counterparts; Afghan commercial transactions that cannot travel through dollar-clearing channels are increasingly routed via Dubai-based intermediaries; and Afghan assets held in UAE banks have provided a partial substitute for the frozen Da Afghanistan Bank reserves [245, 246]. For connectivity projects, this Gulf facilitation role is consequential: Chinese firms engaged at Mes Aynak and in other Afghan ventures have used UAE-based subsidiaries and payment routes to structure transactions in ways that reduce direct U.S. dollar exposure [227]. Expert E2 specifically identified Dubai accounts as the primary financial workaround enabling Uzbek and Afghan commercial transactions in 2024-2025, and survey respondent R5 (Afghanistan) noted that Gulf facilitation was widely understood among Afghan business circles as the only functioning channel for receiving foreign remittances and project payments without triggering correspondent banking refusals. The UAE and Qatar also host Taliban diplomatic missions and have served as venues for backchannel negotiations between Taliban-ruled Afghanistan and Western governments, giving Gulf states a degree of soft leverage over the pace and terms of any future political accommodation. In the Geopolitical Rivalry Matrix, the Gulf states appear not as lock-holders in the U.S./China/Russia sense, but as managed-dissociation enablers: their financial facilitation role allows the structural lock to persist at the multilateral level while creating narrow, low-visibility channels through which limited connectivity proceeds. This function is central to understanding why Mes Aynak and other bilateral Afghan-Chinese arrangements advance at all under comprehensive sanctions, and it represents a dimension of the geopolitical lock that the model acknowledges as a structural feature rather than a peripheral anomaly.

2.2 Regional Rivals and Afghanistan's Central Asian Neighbours

Pakistan: anxious patron and Arabian Sea gatekeeper

Pakistan occupies a central regional position in Afghanistan's connectivity politics, combining deep security interdependence with de facto control over the most direct maritime outlets for Afghan trade. Karachi and, increasingly, Gwadar serve as Afghanistan's primary ports, making Pakistan the principal gatekeeper between Afghan territory and the Arabian Sea [6, 247]. At the same time, Pakistan's threat perceptions shaped by cross-border militancy, tensions over the Durand Line, and rivalry with India produce a highly securitized approach to transit and border management that oscillates between facilitation and coercive closure [248].

Islamabad's goals in Afghanistan blend strategic depth, border security, and transit ambitions. Successive Pakistani governments have sought an Afghan government that is at least not hostile, limits Indian influence, and cooperates on counterterrorism against groups targeting Pakistan, while enabling Pakistan to monetize its location as a conduit for Central Asian trade and energy flows [249-251]. Projects such as the TAPI

gas pipeline, CASA-1000 electricity line, and proposed rail links from Peshawar toward Central Asia reflect a long-standing ambition to turn Pakistan into a regional energy and transit hub, with Afghanistan as the indispensable land bridge [252, 253]. The planned UAP Railway is the clearest expression of this vision in the North-South direction.

In practice, Pakistan's tools toward Afghanistan combine infrastructural leverage and coercive border management. Control over port access and key border crossings allows Pakistani authorities to periodically close or slow trade flows in response to security incidents or political disputes, creating recurrent disruptions that underscore Pakistan's gatekeeping power [232, 233]. Islamabad also uses transit agreements such as successive versions of the Afghanistan–Pakistan Transit Trade Agreement to structure Afghan access on terms that reflect Pakistani security and commercial priorities [254, 255]. Simultaneously, Pakistan promotes Gwadar and CPEC-linked routes as preferred outlets for Afghan and Central Asian trade, seeking to embed Afghan connectivity within a Pakistan-centric corridor architecture [256].

Pakistan's keys are security-heavy and closely linked to its rivalry with India. Officials repeatedly stress the need for the Taliban authorities to prevent Tehrik-i-Taliban Pakistan and other anti-Pakistan militants from using Afghan territory, to accept the Durand Line as an international border in practice, and to limit India's political and security footprint in Afghanistan [249, 257, 258]. Islamabad also expects preferential access for Pakistani ports and logistics networks in any major corridor scheme and views Afghan participation in Indian-backed alternatives such as the Chabahar-Zaranj-Delaram route with suspicion [8, 259]. In the Geopolitical Rivalry Matrix, Pakistan thus appears as an anxious patron and maritime gatekeeper: it can enable or disrupt Afghan trade at relatively low cost, but its stringent security and alignment keys often collide with Afghan nationalism, Taliban factional politics, and India's connectivity strategies, reinforcing managed dissociation rather than integrated regional corridors. CASA-1000's ring-fenced resumption in Afghanistan, which allows energy transit while excluding the Taliban authorities from fiscal control, exemplifies this pattern in the energy sector [89-91].

For Afghanistan, Pakistan's gatekeeping role creates a structurally dependent position that Taliban-ruled Afghanistan has been unable to escape. Afghan exporters have no alternative seaport access that bypasses Pakistani territory without also incurring the sanctions and capacity constraints associated with Iran's Chabahar. This dependence gives Pakistan a recurring coercive instrument, the ability to close or slow border crossings, that it has used repeatedly to signal displeasure with Afghan policy. The corridor implication for Afghanistan is direct: any UAP Railway configuration that routes primarily through Pakistani ports consolidates this dependence rather than diversifying it, meaning that Afghanistan's corridor strategy must account for Pakistan's alignment incentives if it is to generate durable rather than politically vulnerable transit revenue.

India: contained contender and Chabahar strategist.

India approaches Afghanistan's connectivity primarily as a way to circumvent Pakistan and to anchor a larger role for itself in Central Asia, while remaining

constrained by geography and security risks [7, 8, 260]. New Delhi lacks direct land access to Afghanistan and has sought to use Iran's Chabahar port and associated overland routes through Iranian and Afghan territory to reach Central Asian markets, although recent funding decisions and sanctions-related uncertainty have complicated the further expansion of this corridor [261-263]. This structural dependence on Iran, combined with U.S. sanctions pressure and the Taliban's rise, has turned India into a contained contender: a state with clear corridor ambitions but limited ability to translate them into operational influence after 2021 [232, 233, 264].

India's goals in Afghanistan and the wider region blend geostrategic competition with Pakistan, balancing against China, and securing energy and trade access. For two decades, New Delhi invested heavily in Afghan infrastructure and state-building including the Zaranj-Delaram highway, power projects, and the Afghan parliament building to cultivate goodwill and counter Pakistan's dominance [265, 266]. Regionally, India's Connect Central Asia policy and participation in forums such as the India-Central Asia Dialogue frame Afghanistan as a pivotal land bridge for Indian access to Central Asian hydrocarbons and markets [267]. At the same time, India seeks to limit Chinese strategic gains from BRI and CPEC, widely perceiving Chinese-funded ports and corridors in Pakistan as part of a broader encirclement strategy in the Indian Ocean region [268-270].

Chabahar is India's principal tool for operationalizing this strategy. By financing and operating terminals at Chabahar and constructing the Zaranj-Delaram road inside Afghanistan, India created an India-Iran-Afghanistan multimodal corridor explicitly designed to bypass Pakistan and reduce dependence on Karachi and Gwadar [263, 269]. New Delhi has repeatedly framed Chabahar as a "gateway" for India-Central Asia trade and has sought U.S. sanctions waivers to protect the project from Iran-related restrictions, arguing that Chabahar supports Afghan stabilization and offers an alternative to Chinese-backed routes [271]. However, U.S. sanctions on Iran, slow implementation, and uncertainty after the Taliban takeover have limited the corridor's actual throughput and left much of its potential unrealized [47, 272, 273].

The Taliban's return to power has forced India into a more cautious and reactive posture. New Delhi initially closed its embassy in Kabul, then reopened a downgraded "technical mission" in 2022 and, by 2025, moved to restore a full diplomatic presence and accredit Taliban diplomats, while still withholding formal recognition [274-276]. India has continued to signal support for Chabahar and northbound connectivity and has used the port for humanitarian shipments yet remains reluctant to commit to large new investments in Taliban-ruled Afghanistan because of terrorism risks, Pakistan's influence, and domestic political sensitivities [272, 275, 277]. As a result, India's connectivity influence in and around Afghanistan is largely mediated through Iran and regional diplomacy rather than direct leverage over Afghan territory [275, 277].

India's keys are shaped by its rivalry with Pakistan and broader strategic orientation. New Delhi expects any Afghan authority to limit Pakistan-linked militant groups that threaten Indian interests, to prevent Afghan soil from being used for attacks on India, and to allow some Indian development and economic presence independent of Pakistani veto [275-277]. It also implicitly demands that key corridors, especially

those linked to Chabahar, not be subordinated to Pakistani or Chinese control, and resists any regional architecture that entrenches Pakistan and China as primary gatekeepers to Central Asia [278, 279]. In the Geopolitical Rivalry Matrix, India therefore appears as a constrained but significant actor: it possesses substantial economic and diplomatic resources and a clear connectivity vision centred on Chabahar, yet its lack of direct geography and the combined effects of U.S. sanctions on Iran, Taliban rule, and Pakistani obstruction keep it in a structurally disadvantaged position, reinforcing fragmented managed dissociation rather than any neat Indian-led corridor solution [277, 279].

For Afghanistan, India's engagement through Chabahar represents one of the few cases where a major regional power has invested in Afghan-linked infrastructure [280] without routing it through Pakistani territory. The Zaranj-Delaram highway, financed by India, remains the clearest example of an Afghan connectivity asset with an Indian imprint that serves Afghan commercial interests independently of the Islamabad-Gwadar axis. The Afghan implication of India's constrained contender status is therefore conditional: if Chabahar's sanctions environment stabilizes and Indian financing for Afghan-segment infrastructure resumes, Afghanistan gains a genuine alternative outlet and a bargaining counter against Pakistani gatekeeping; if India's corridor ambitions remain suppressed by sanctions on Iran, Afghanistan loses its only significant non-Pakistani maritime connection.

Iran: pragmatic, sanctions-hit alternative outlet.

Iran occupies an ambivalent position in Afghanistan's connectivity politics: it is both a critical alternative outlet for Afghan and Central Asian trade and itself heavily constrained by U.S. sanctions and domestic economic weakness [238-240]. Through Chabahar port and overland routes via the Milak-Zaranj-Delaram axis, Iran offers Afghanistan and India a route to the Indian Ocean that bypasses Pakistan, while seeking to monetize its geography as a transit state within broader North-South and East–West corridors. At the same time, Iran's isolation from Western financial systems and periodic domestic and regional instability limit the scale and reliability of its connectivity offerings.

Tehran's goals in this domain combine regional influence, sanctions circumvention, and economic diversification. By hosting India at Chabahar and promoting the port as part of both the INSTC and India-Central Asia trade routes, Iran positions itself as an indispensable node for actors seeking non-Pakistani access to Afghanistan and Central Asia [198, 199, 271]. Iranian policymakers also view transit revenues, logistics, and energy swaps such as electricity and fuel supplies to neighbours as ways to generate hard currency and partially offset the impact of oil sanctions [281]. In the Afghan context, Iran balances ideological and cultural ties to segments of the Afghan population, especially Hazaras and Shia groups, with pragmatic engagement of the Taliban to secure border stability and trade flows [282, 283].

Regional experts depict Iran as both an essential alternative outlet and a structurally constrained actor due to sanctions and security problems in Sistan-Baluchistan. Interviewees note that concerns over war, sanctions, and local insurgency have undermined Chabahar's reliability as a stable corridor, even as India and some

Western actors promote it as an alternative to CPEC (E3). At the same time, worsening security along the Iran-Pakistan-Afghanistan triangle, including refugee deportations and border incidents, is seen as adding another layer of tension that complicates sustained investment in trans-border infrastructure (E3, R6, R8). These perceptions underpin the coding of Iran's keys as sanctions relief and improved border security, without which its role in unlocking Afghan connectivity remains partial and volatile.

For Afghanistan, Iran's partial role as an alternative outlet has concrete implications that the dissertation's corridor analysis should not understate. Western Afghanistan's border provinces, Herat, Nimroz, Farah, are commercially more integrated with Iranian markets than with Kabul or Pakistani ports, and Iranian electricity supplies to Herat represent a real, if precarious, energy-connectivity lifeline. When Iranian routes are disrupted, by sanctions tightening, border incidents, or diplomatic breakdown, the Afghan segment of any east-west corridor loses its only current non-Pakistani maritime access, with immediate consequences for import costs and food security in the west of the country. This fragility underscores that Afghanistan's connectivity is not merely a matter of future corridor construction but of protecting existing, albeit limited, transit links that are already operative.

Iran's main tools are its ports, road and rail network, and willingness to trade with Afghanistan and Central Asia despite sanctions. Chabahar has been promoted as a "sanctions-resilient" port, with India and Iran both lobbying for and at times receiving limited U.S. sanctions carve-outs on the grounds that the project supports Afghan reconstruction and provides alternatives to Chinese-backed Gwadar [272, 284, 285]. Iran has invested in road links from Chabahar to Afghanistan and in rail segments that ultimately aim to connect to the Afghan border and, farther north, to Central Asian networks [238, 239, 286]. It also supplies electricity and fuel to western Afghanistan and has used customs and border management as instruments to pressure or reward the Taliban depending on behaviour over refugees, drug flows, and water use, notably in disputes over the Helmand River and related power cuts to Herat [201, 287].

Yet Iran's capacity to function as a fully reliable alternative corridor is sharply circumscribed by its own sanctions environment. U.S. secondary sanctions deter many international shipping lines, insurers, and banks from engaging with Iranian ports, and episodes of regional tension in the Gulf have periodically disrupted maritime traffic and raised war-risk premiums [288-290]. For Afghanistan and Central Asian states, this means that while Chabahar and Iranian routes provide valuable diversification and bargaining leverage vis-à-vis Pakistan, they cannot simply replace Pakistani outlets in terms of volume, financing, and global market integration [284, 291]. Moreover, Tehran's domestic economic crisis and infrastructure bottlenecks limit its ability to rapidly expand capacity even when political will exists [291].

Iran's keys in relation to Afghanistan are more circumscribed than those of the United States but still consequential. Tehran expects the Taliban authorities to manage refugee flows in ways acceptable to Iran, to curb Sunni extremist groups hostile to Iran, to respect Iranian concerns over water usage from shared rivers, and to tolerate an Iranian cultural and economic presence in western Afghanistan [282, 292]. In return, Iran offers continued trade, energy supplies, and access to Chabahar on terms that allow

both sides to partially circumvent Western pressures [293]. In the Geopolitical Rivalry Matrix, Iran therefore appears as a pragmatic, sanctions-hit actor: it offers a partial unlocking route that can soften Pakistan's monopoly but cannot, by itself, deliver a fully integrated, financially robust corridor solution, thereby contributing to managed dissociation rather than comprehensive integration [282, 293].

Afghanistan's Central Asian neighbours: proactive connectors under constraint

Afghanistan's Central Asian neighbours, above all Uzbekistan, with Kazakhstan and Turkmenistan in supporting roles approach Afghanistan as both a security liability and a crucial opportunity to diversify access to seaports. Since 2016, Tashkent has pursued a more outward-looking "connectivity diplomacy," positioning Uzbekistan as a regional hub linking Central Asia to South Asia and the Middle East, with Afghanistan as the indispensable southern corridor [231-233]. Kazakhstan and Turkmenistan similarly seek additional southbound routes that would reduce their over-reliance on Russian infrastructure and vulnerable chokepoints in the Caspian and Black Sea regions [231, 284, 294]. Within this group, the differentiation matters analytically: Uzbekistan functions as the principal initiator of the UAP Railway and the most proactive advocate of trans-Afghan connectivity, whereas Kazakhstan and Turkmenistan play complementary and more indirect roles through supporting corridor strategies and port-access diversification; this differentiation is reflected in the matrix coding and is essential for understanding the distribution of regional incentives and hesitations.

Uzbekistan's goals are particularly central to the Trans-Afghan Corridor vision. Tashkent aims to secure shorter, cheaper access to Pakistani ports via rail through Afghanistan, expand trade with South Asia and the Middle East, and boost its status as a land-linked rather than land-locked state [23, 295, 296]. The proposed UAP Railway embodies this ambition, with feasibility studies and media reports suggesting it could significantly cut transit times and transport costs compared to existing routes via Russia and the Caucasus [136-138]. Kazakhstan and Turkmenistan, while less directly involved in Afghan security, view participation in a North-South Trans-Afghan route as a way to plug into new markets and hedge against geopolitical disruptions affecting westward exports [297, 298].

Kazakhstan's engagement deserves separate emphasis, both because of its weight in Central Asian trade and because of the regional perspective within which this dissertation is situated. Astana has pursued a distinctly pragmatic line since 2021: it removed the Taliban from its national list of banned organizations, maintained and expanded trade in grain, flour, fuel, and industrial goods, hosted Afghan business delegations, and framed trans-Afghan routes as a component of its long-term strategy of diversifying access to South Asian markets and reducing dependence on any single transit direction. At the same time, Kazakhstan's approach remains deliberately calibrated: engagement is commercial and working-level, stops short of formal recognition, and is hedged by continued investment in alternative corridors, an approach that exemplifies, at the level of a single state's policy, the calibrated logic of managed dissociation that this dissertation theorizes [173].

Their main tools are diplomatic entrepreneurship, infrastructure planning, and selective economic engagement with the Taliban authorities. Uzbekistan has hosted multiple regional conferences on Afghanistan's economic integration, engaged in trilateral formats with Pakistan and the Taliban, and worked with the ADB and other partners on feasibility studies for the UAP line [23, 232, 233]. Tashkent and Ashgabat have also developed rail and road links to Afghan border points such as the Hairatan-Mazar-e-Sharif line and connections from Turkmenistan into western Afghanistan which could, in principle, be extended southward [238, 239, 240]. At the same time, Central Asian leaders have cautiously normalized working level relations with the Taliban to keep borders open, maintain trade, and avoid security spillovers, while stopping short of formal recognition [231-233].

However, these states operate under significant constraints imposed by the systemic lock and their own security concerns. Dependence on Russian security guarantees and energy transit, sensitivity to Western sanctions, and fears of jihadist infiltration from Afghanistan all limit how far Central Asian governments can go in formalizing large-scale infrastructure deals with the Taliban [22, 232, 233]. Financing for major projects such as the UAP Railway ultimately depends on multilateral development banks and private capital that are deeply exposed to U.S. and EU compliance regimes, making Central Asian plans vulnerable to the broader sanctions environment [23]. Internally, concerns about Islamist radicalization and border security encourage cautious, compartmentalized engagement with the Taliban despite strong economic incentives for deeper connectivity [231-233].

The keys demanded by Afghanistan's Central Asian neighbours reflect their hybrid position as both aspirant connectors and risk-averse neighbours. They expect the Taliban authorities to maintain basic border security, prevent cross-border militant activity, and honour transit and customs agreements, while also seeking assurances that any corridor will not be easily disrupted by great-power rivalry or sanctions [22, 231]. In the Geopolitical Rivalry Matrix, Uzbekistan and its neighbours appear as proactive but structurally constrained actors whose willingness to push for trans-Afghan corridors repeatedly runs up against the systemic locks imposed by the United States, the cautious posture of China, and Russia's routing preferences, reinforcing a broader equilibrium of stalled or fragmented connectivity [22, 297].

For Afghanistan, Central Asian proactivity is both an opportunity and a constraint. Uzbekistan's diplomatic entrepreneurship has produced the July 2025 trilateral framework agreement and the feasibility study process that constitute the most substantive recent advance in UAP Railway planning. Yet Tashkent's ability to push the project toward construction is ultimately limited by the same sanctions environment and recognition gap that constrain all other actors: Uzbekistan cannot substitute its own credit for the missing multilateral finance, and it cannot compel Taliban-ruled Afghanistan to reform its customs and institutional framework at the pace that a bankable project would require. The Afghan implication is that Central Asian support, genuine, economically motivated, and diplomatically active, is a necessary but insufficient condition for corridor realization, and that the structural lock must be

addressed at the systemic level if Uzbekistan's corridor diplomacy is to convert into construction.

2.3 The National Level: The Taliban Gatekeeper

Taliban-ruled Afghanistan is the pivotal sovereign gatekeeper in this study: it exercises effective territorial control and border authority over Afghanistan yet remains only partially engaged and largely unrecognized in the international system [185, 299]. In the geopolitical lock-and-key model, Taliban-ruled Afghanistan is neither a passive object of great-power rivalry nor a fully autonomous state actor, but a regime with bounded agency that seeks to leverage territorial control, transit geography, and natural resources to secure regime survival under sanctions and non-recognition [184, 185]. Its behaviour critically shapes whether external actors can convert connectivity plans into functioning corridors, or are constrained to narrow, bilateral bargains. In addition to these external constraints, Taliban-ruled Afghanistan's gatekeeper role is bounded from within by institutional weaknesses, capacity deficits, factional politics, and governance controversies, which interact with sanctions and rival corridor strategies to shape its bargaining position. These internal factors are treated in this dissertation not as residual background noise but as co-causal constraints, endogenous to the model as components of bounded agency, and they are traced empirically in the case analysis in Chapter 3.

Ideology, governance, and internal constraints

The Taliban's ideological orientation and governance model constitute the first layer of constraint. Since August 2021, the movement has re-established an Islamic Emirate characterized by centralized religious authority, exclusionary decision-making, and restrictive policies on women's rights, media, and civil society [184, 300, 301]. The political system is dominated by a small clerical core around the Amir and key shura bodies, with limited institutionalized channels for technocratic input or external accountability [302]. This configuration creates internal veto players hardline factions particularly resistant to concessions perceived as diluting Islamic governance or sovereignty which narrow the Emirate's room for manoeuvre in negotiations with external actors over connectivity, security, and investment [184, 185].

Institutionally, Taliban-ruled Afghanistan has demonstrated greater coercive capacity and revenue-collection effectiveness than many anticipated but remains weak in policy coordination and regulatory governance. The regime has consolidated control over customs, border posts, and local taxation, reportedly mobilizing revenue levels comparable to or above those of the pre-2021 republic by tightening collection of customs duties, transit fees, and resource royalties [185, 299]. Yet ministerial capacity for complex tasks such as managing large-scale infrastructure contracts, environmental regulation, or multi-actor corridor governance remains limited, with overlapping mandates, cadre inexperience, and opaque decision-making processes [182, 185]. This combination of coercive effectiveness and institutional fragility shapes the Emirate's ability to credibly commit to corridor security and contractual obligations demanded by external investors.

Economic strategy: from basic stabilization to extraction and transit

Facing frozen foreign reserves, banking isolation, and declining aid, the Taliban leadership has explicitly elevated economic self-reliance through mining, taxation, and

transit into a core pillar of regime survival. Public statements by the Ministry of Mines and Petroleum and the Ministry of Economy emphasize resource extraction and regional connectivity as key revenue sources to compensate for Western sanctions and the collapse of grant inflows [245, 303]. The Emirate has systematically expanded licensing of small and medium-scale mines, organized gemstone auctions, and concluded well over one hundred mining contracts in 2023-2024, using auctions and royalties to generate new streams of domestic revenue [272, 303, 304].

This extraction-first strategy, however, quickly runs up against infrastructure and financing bottlenecks. Gems and light petroleum can be moved via existing roads and informal logistics, but bulk commodities such as copper or iron ore require reliable power, rail, and port access that Afghanistan currently lacks [303, 305, 306]. Taliban officials regularly present rail projects, including North-South links through Uzbekistan and Pakistan, as essential complements to mining development and position Afghanistan as a future transit and energy corridor [185, 299]. Yet the same sanctions and non-recognition that drive the emphasis on extraction and transit also inhibit access to long-term capital and technology needed to realize these plans [245, 307, 308]. As a result, Taliban-ruled Afghanistan's economic strategy intensifies the desire to "unlock" connectivity while deepening dependence on a small pool of willing partners above all China, regional neighbours, and some Gulf actors who themselves face U.S. and UN compliance constraints [216, 217].

Foreign policy and quest for recognition

Externally, the Taliban pursues a dual foreign policy track: wide-ranging de facto engagement and a persistent quest for de jure recognition. Officially, most states and the United Nations continue to treat Taliban-ruled Afghanistan as "de facto authorities," with the UN Credentials Committee repeatedly deferring changes to Afghanistan's representation and thereby signalling that the Taliban government is not recognized as the legitimate government of Afghanistan [309, 310, 311]. A growing number of states, however, have moved toward de facto accommodation, accrediting Taliban-nominated diplomats or allowing Taliban control of Afghan embassies, particularly in the region [312-314]. By the mid-2020s, China, Russia, and several Central Asian states had either exchanged ambassadors with Taliban-ruled Afghanistan or accepted Taliban envoys, even as most Western governments maintained a policy of non-recognition linked to human rights and counterterrorism conditions [314, 315].

Within this environment, the Taliban leadership has engaged in active regional diplomacy to build parallel legitimacy and economic ties. Taliban representatives have participated in Moscow Format meetings, trilateral dialogues, consultations with Central Asian states, and forums hosted by Gulf countries, using these platforms to present the Emirate as a stabilizing actor and reliable partner for trade and energy transit [316, 317, 318]. This diplomacy has produced a patchwork of bilateral understandings on trade, border management, and pilot projects, but has not yielded the comprehensive recognition or sanctions relief Taliban-ruled Afghanistan seeks. Instead, the Emirate finds itself in a liminal status: increasingly embedded in regional diplomacy and commerce yet still excluded from Western-led financial institutions and subject to targeted sanctions regimes [309, 310, 319].

The Taliban's keys: recognition, sanctions relief, and regime security

In the Rivalry Matrix, Taliban-ruled Afghanistan's keys, the conditions it demands for full cooperation in connectivity and resource deals, are multi-dimensional and often misaligned with the keys of great powers and regional states. At minimum, Taliban leaders consistently seek:

1. International recognition and diplomatic normalization. Senior Taliban figures repeatedly frame recognition as a prerequisite for stable, long-term agreements, arguing that without formal status they cannot fully guarantee investors' rights or integrate Afghanistan into global economic institutions [185, 299]. Recognition is also linked to domestic legitimacy: the Emirate uses foreign acceptance to bolster its claim to exclusive authority and to marginalize exiled opposition [294].

2. Sanctions relief and access to financial channels. Taliban-ruled Afghanistan demands the unfreezing of central bank reserves, removal of key leaders from sanctions lists, and restoration of normal banking relations, portraying these steps as essential for economic recovery and the viability of large-scale connectivity projects [245, 320, 321]. From the Emirate's perspective, expecting it to deliver security and governance benefits while remaining cut off from the formal financial system is both inequitable and unsustainable [245, 321].

3. Non-interference in the Emirate's internal governance model. Taliban leaders insist that external actors accept the Islamic Emirate's ideological and legal framework, including gender and social policies, as an internal matter not subject to conditionality [182, 185]. They resist demands for political pluralism, inclusive power-sharing, or far-reaching human-rights concessions as infringements on sovereignty and as potential threats to internal cohesion [182, 301, 322].

4. Assurances on regime security. The Emirate seeks guarantees implicit or explicit that external actors will not support armed opposition, sanctions-driven destabilization, or efforts to replace the regime under the banner of counterterrorism or human rights [321, 323]. For the Taliban, long-term connectivity commitments are conceivable only if regime survival is not perceived to be at immediate risk [185, 299].

These keys are only partially compatible with those of other actors. U.S. and EU conditions for sanctions relief explicitly hinge on human-rights and governance changes the Taliban is unwilling to implement; Chinese and Russian security expectations regarding militant groups intersect with, but do not fully align with, Taliban priorities; and regional neighbours' demands on water, borders, and refugee management often clash with domestic political considerations in Kabul [10, 141, 142]. This incompatibility is central to the durability of the geopolitical lock.

Internal Factionalism and Its Effect on Negotiating Consistency

The Taliban's bounded agency in connectivity bargaining is shaped not only by external sanctions and non-recognition but also by persistent internal factionalism that constrains how consistently and credibly Taliban-ruled Afghanistan can commit to economic agreements. Understanding this internal dimension is essential for interpreting why large-scale projects like Mes Aynak and the UAP Railway produce public ceremonies and signed memoranda that are not followed by sustained implementation.

Taliban-ruled Afghanistan's decision-making structure is centred on Amir Haibatullah Akhundzada and the Rahbari Shura (Leadership Council) based in Kandahar, which retains ultimate authority over strategic, ideological, and security matters. Below this layer, a Kabul-based executive tier including the Deputy Prime Ministers, notably Abdul Ghani Baradar (Economic Affairs) and Abdul Salam Hanafi (Political Affairs), manages day-to-day governance and external engagement [184]. This bifurcated structure creates a recurring tension: Kabul-based officials who negotiate connectivity agreements with foreign counterparts, present investment ceremonies, and signal pragmatic openness to foreign capital do so with limited autonomous authority to commit the Kandahar core on ideological or sovereign questions that intersect with economic deals. Interview respondents from the Afghan MoFA (A1, A2, A3) consistently presented Taliban-ruled Afghanistan as unified and decisive on connectivity, while external expert respondents (E1, E5) noted that the observable gap between ceremonial commitment and operational follow-through reflects this internal authority structure rather than simple bureaucratic delay.

A second layer of factionalism operates at the provincial level. Taliban commanders in resource-rich or corridor-adjacent provinces, including Logar (Mes Aynak), Balkh (Hairatan crossing), and the eastern provinces along the potential UAP route, operate with significant de facto autonomy over local taxation, security provision, and access permits [227, 324, 325]. These commanders have interests in maintaining informal revenue streams from mining royalties, transit levies, and checkpoint fees that are not always aligned with the central government's stated objective of attracting large formal investment. As survey respondent R5 (Afghan academic, publications on Afghanistan geopolitics) noted in open-ended responses, the gap between Taliban's central government decisions and actual implementation at the local level is one of the biggest internal obstacles to project realization. This provincial autonomy is empirically visible in the Mes Aynak case, where central government ceremonies in Logar do not translate into consistent on-the-ground facilitation, and in the recurrent customs irregularities at Hairatan documented in ADB CAREC monitoring reports [23].

A third dimension concerns the relationship between economic pragmatists and ideological hardliners within the movement. Taliban-ruled Afghanistan contains figures who view foreign investment and corridor revenues as existential necessities for regime survival without external aid, alongside factions who prioritize Islamic governance standards, resistance to foreign cultural influence, and strategic self-reliance as higher values than economic integration [182]. When external investors, Chinese at Mes Aynak, Uzbek and Pakistani for UAP, raise demands for governance transparency, dispute resolution mechanisms, independent monitoring, or labour standards, they trigger internal Taliban-ruled Afghanistan debates that the pragmatist faction may not win. The result, visible across multiple negotiations since 2021, is a pattern where Taliban-ruled Afghanistan offers just enough concession to maintain diplomatic momentum without crossing ideological red lines set by the Kandahar core, a dynamic that expert survey respondents from Pakistan (R3, R7) described as intentional ambiguity serving both internal coalition management and external

bargaining simultaneously. For the geopolitical lock-and-key model, this internal factionalism is not an exogenous complication but an endogenous component of the gatekeeper's bounded agency: it is the mechanism through which Taliban-ruled Afghanistan's sovereign control over territory translates into limited rather than transformative connectivity bargaining outcomes.

Bounded agency: a gatekeeper that can open doors, but not the lock.

Taken together, these features define the Taliban as a gatekeeper with bounded agency. On the one hand, Taliban-ruled Afghanistan has real capacity to facilitate or obstruct specific projects: it controls territory and border crossings, can provide or withhold security guarantees for infrastructure, and can sign agreements that enable bilateral mining ventures or limited transit arrangements, as seen in smaller extraction contracts and pilot trade deals [245, 303, 326]. In this sense, the Emirate can secure transactional openings for actors willing to accept its terms and work around sanctions.

On the other hand, the Emirate cannot, by itself, unlock the structural deadlock that keeps Afghanistan from becoming an integrated corridor. It cannot unilaterally alter U.S. and UN sanctions, change the balance of great-power rivalry, or resolve Pakistan-India competition over ports and influence. Moreover, its own keys recognition, extensive sanctions relief, and deference to its governance model are precisely the conditions that many external actors are least willing to concede [327, 328]. As a result, the likely outcome is the equilibrium described in Chapter 1 as managed dissociation: a patchwork of bilateral, sector-specific deals in mining, limited transit, and energy swaps that provide the Emirate with some revenue and legitimacy but fall short of integrating Afghanistan into a coherent, multi-actor connectivity architecture [216, 217, 303].

This gatekeeper profile completes the actor mapping for the Geopolitical Rivalry Matrix. The subsequent empirical chapters will show how the interaction between Taliban-ruled Afghanistan's bounded agency and the incompatible keys of systemic and regional actors produces stalled implementation in the UAP Railway case and partial, fragile progress in the Mes Aynak copper project [67, 329].

2.4 Mapping Actors Through the Geopolitical Rivalry Matrix: Goals, Tools, Red Lines, and Keys

The Geopolitical Rivalry Matrix synthesizes the preceding actor profiles into a structured map of how great powers, regional states, and the Taliban gatekeeper jointly sustain Afghanistan's connectivity deadlock. Building on the conceptual and operational introduction of the matrix in Section 1.4, this section populates it with empirical content: the matrix arrays actors along one axis (systemic, regional, gatekeeper) and codes, along the other, four core dimensions: goals (what each actor seeks in and through Afghanistan), tools (the instruments it uses), red lines (non-acceptable outcomes), and keys (non-negotiable conditions for supporting or ceasing to obstruct integrated connectivity). This format translates the abstract components of the geopolitical lock into observable configurations of preferences and capabilities.

For systemic actors, the matrix captures how the United States, China, and Russia each advance distinct corridor visions and employ different forms of leverage. The

United States prioritizes counterterrorism, containment of rivals, and human rights, wielding sanctions, control over Afghan reserves, and influence in multilateral finance as tools; its red lines include unconstrained terrorist safe havens and unconditional recognition of the Taliban, and its keys combine robust counterterrorism guarantees, governance changes, and normative commitments [330, 331]. China seeks security in Xinjiang, access to resources, and incremental extension of BRI/CPEC, using selective investment and diplomatic engagement as tools, with red lines around anti-Chinese militancy and severe instability; its keys emphasize security assurances, contract protection, and manageable reputational risk [67, 221, 329]. Russia aims to retain regional security primacy and reconfigure trade via INSTC and related routes, combining CSTO-anchored security and corridor promotion as tools, with red lines against hostile militant activity and marginalization from Eurasian transit; its keys focus on security cooperation and route designs that preserve Russian leverage [232 - 234].

Table note: The Geopolitical Rivalry Matrix operationalizes the geopolitical lock-and-key model by coding each actor's primary goals, tools, red lines, and unlocking conditions ("keys") in relation to Afghanistan's post-2021 connectivity environment. It draws on post-2021 strategy and policy documents, official communiqués, and secondary analyses to identify how systemic lock-holders (United States, China, Russia), regional rivals (Pakistan, India, Iran), the contiguous Central Asian states, and the Taliban gatekeeper define their core interests and leverage instruments [22, 141, 142]. The subsequent case chapters use this matrix as a heuristic guide: Chapter 3 traces how incompatible keys among great powers and regional rivals sustain deadlock in the UAP Railway (Section 3.1), and how the Taliban and China attempt but largely fail to align their keys at Mes Aynak under a persistent U.S.-centred financial lock (Section 3.3); Chapter 4 then evaluates the model synthetically.

The full expanded matrix, including preferred projects, primary rivals, and case-specific implications for each actor, is provided in Table A.2 in Appendix A.

Table 2.1. Geopolitical Rivalry Matrix: actors, goals, tools, red lines, and keys

Actor	Primary goals	Principal tools	Red lines	Keys (unlocking conditions)
United States	Counterterrorism; contain China/Russia; promote human rights; preserve financial dominance	Sanctions (OFAC); Afghan reserve freeze; IFI influence; alternative corridor support (Chabahar carve-outs)	Unchecked terrorist safe havens; unconditional Taliban-ruled Afghanistan recognition; Chinese or Russian corridor dominance in South/Central Asia	Verifiable CT guarantees; severing AQ/ETIM ties; measurable women's rights progress; inclusive governance steps. Broad and stringent, largely incompatible with Taliban-ruled Afghanistan's own key demands (A1-A3; E1, E3)
China	Xinjiang security;	Selective investment;	ETIM cross-border attacks;	Robust security guarantee for personnel and assets;

Actor	Primary goals	Principal tools	Red lines	Keys (unlocking conditions)
	resource access (copper, lithium); BRI/CPEC southern extension; avoid US secondary sanctions	diplomatic recognition short of de jure; trilateral forums; zero-tariff trade preferences	Chinese worker casualties; secondary sanctions exposure; ESG reputational damage	ETIM suppression; contract enforceability; sanctions-resilient payment channels. Transactional and in principle achievable, but only partially met [133]
Russia	CSTO security primacy; INSTC trade pivot; contain jihadist spillover; retain Eurasian transit leverage	CSTO exercises; Moscow Format; INSTC route promotion; selective Taliban engagement; oil/fuel transit	Hostile militant spillover into CSTO zone; Afghan routes that bypass Russia and consolidate China or Indian dominance	CT cooperation; corridor geometry that reinforces INSTC and Russian transit role; acceptance of Russian security leadership in Central Asia. Conditionally facilitative, Russia supports UAP only if it is embedded in INSTC geometry [232, 233]
EU	Human rights, democratic governance; counterterrorism; reduce irregular migration from Afghanistan	Autonomous sanctions; humanitarian aid carve-outs; derisking pressure on European banks	Unchecked Taliban human rights abuses; condoning Taliban-ruled Afghanistan without governance progress	Measurable improvements on women's and girls' rights; counterterrorism cooperation; governance accountability. Broadly aligned with US keys, reinforces normative dimension of the lock (E1, E3) [243]
Pakistan	Strategic depth; Karachi/Gwadar as primary outlets; limit Indian presence; TTP suppression; transit rents	Border closures; APTTA leverage; CPEC/Gwadar framing; military pressure on Durand Line	Sustained Indian military/economic foothold in Afghanistan; TTP safe havens; Afghan routes bypassing Pakistani ports	Taliban-ruled Afghanistan action against TTP; de facto Durand Line acceptance; Gwadar/Karachi prioritized over Chabahar for UAP terminus; limited Indian economic presence. Anxious patron with coercive border tool (E4; R1, R3, R7)
India	Bypass Pakistan; Chabahar/INSTC access	Chabahar investment; Zaranj-Delaram	Pakistan-dominated Afghan corridor; Afghan soil used for	Protected Indian economic presence independent of Pakistani veto; viable non-Pakistani

Actor	Primary goals	Principal tools	Red lines	Keys (unlocking conditions)
	to Central Asia; counter BRI/CPEC influence; Afghan goodwill	highway; diplomatic mission in Kabul; lobbying for sanctions waivers	attacks on India; Chinese-controlled maritime chokepoints	maritime access for Afghan/Central Asian trade; Chabahar sanctions carve-out. Structurally disadvantaged, constrained by Iran sanctions (R5, R6)
Iran	Chabahar transit revenue; sanction circumvention via Afghan trade; border security; water (Helmand River)	Chabahar port; overland routes; electricity/fuel leverage; border management pressure	Sunni extremist activity; refugee surges; unilateral Afghan water diversion; corridor configurations that make Chabahar irrelevant	Taliban-ruled Afghanistan management of refugees and border; respect for water agreements; tolerance of Iranian cultural/economic presence in western Afghanistan. Partial and volatile, own sanctions exposure limits corridor reliability (E3; R6, R8)
Uzbekistan / Central Asian states	Diversified port access; reduce Russian/Caspian dependence; UAP Railway; land-linked status	Corridor diplomacy; Hairatan infrastructure; trilateral agreements; ADB engagement	Security spillover into CSTO zone; sanctions-triggered financial exposure; Afghan corridor instability undermining investment case	Border security and CT cooperation; sanctions-resilient financing mechanism; Taliban-ruled Afghanistan customs/institutional compliance with CAREC/TIR frameworks. Proactive but structurally constrained, cannot substitute for missing multilateral finance [23]
Taliban-ruled Afghanistan (Taliban gatekeeper)	Regime survival; international recognition; sanctions relief; transit/mining revenue; ideological Islamic governance	Territorial control; border permits; security guarantees; contract allocation; regional diplomacy; bilateral MOUs	External interference in internal governance; attempts to replace the regime; demands incompatible with Islamic rule; conditionality on women's rights/pluralism	International recognition (de jure or de facto); significant sanctions relief; Da Afghanistan Bank reserve access; non-interference in governance model; regime security assurances. Structural mismatch with US/EU keys makes comprehensive alignment improbable (A1-A3) [141, 185]

Sources: Actor profiles in §§2.2-2.4; interview codes in parentheses refer to elite interviews (A1-A3, E1-E5) and expert survey respondents (R1-R14) cited in the empirical chapters. Primary

sources marked in the bibliography. For the full expanded matrix including preferred projects and primary rival columns, see Table A.2 in Appendix A.

A complementary summary of systemic lock-holders highlights how their tools and keys translate into concrete implications for UAP and Mes Aynak:

The matrix also makes visible how infrastructural "plumbing" sanctions, banking access, insurance, and project-specific safeguards is distributed across actors, with some states able to activate or relax financial locks that shape the feasibility of otherwise technically viable corridors [30].

At the regional level, the matrix shows Pakistan, India, Iran, and the contiguous Central Asian states pursuing corridor strategies that are partly complementary and partly mutually exclusive. Pakistan seeks strategic depth, border security, and transit rents via Karachi and Gwadar, relying on port access, border closures, and CPEC framing as tools; its red lines include sustained Indian military presence in Afghanistan and unchecked anti-Pakistan militancy, and its keys demand action against hostile groups, de facto acceptance of the Durand Line, and preference for Pakistan-centric routes [8, 9, 332]. India aims to circumvent Pakistan and anchor its role in Central Asia through Chabahar, using Indian-financed infrastructure and diplomacy as tools; its red lines centre on Pakistan-dominated corridor architectures and Afghan-based attacks on India, and its keys require protected Indian economic presence and viable, Pakistan-free access to Central Asia [7, 232, 233]. Iran seeks transit revenues and regional influence despite sanctions, employing Chabahar, energy supplies, and flexible trade as tools; its red lines include hostile Sunni extremist activity and unacceptable water and refugee policies, and its keys emphasize respect for Iranian security and water concerns along with tolerance of Iranian economic presence [271, 287]. Uzbekistan and neighbouring Central Asian states pursue diversification and "land-linked" status through trans-Afghan routes, using diplomatic entrepreneurship and border infrastructure as tools; their red lines involve large-scale security spillover and sanctions-triggered exposure, and their keys demand basic border security and sanction-resilient financing for corridors [23, 179, 231].

Interviewees frequently portray Pakistan-India rivalry as at least as important as great-power competition in fragmenting connectivity through Afghanistan (E1, E3, R5, R7). Several experts argue that territorial disputes and strategic mistrust between Islamabad and New Delhi have repeatedly derailed or slowed shared projects such as TAPI, with one respondent warning that the pipeline could easily become a tool of political leverage or blockade (E1, E3, R5). Others emphasize that India–Pakistan competition shapes port preferences, with India and the United States backing Chabahar as an alternative to CPEC-Gwadar and Pakistan resisting any route that would dilute its gatekeeper role over Afghan access to the sea (R7). These testimonies strengthen the coding of Pakistan's key as preserving strategic control over access and security on its western border, and India's key as avoiding over-dependence on Pakistani territory while retaining leverage over Pakistan's connectivity options.

Finally, the Taliban's Islamic Emirate appears in the matrix as a sovereign gatekeeper whose goals, tools, red lines, and keys intersect with, but do not align with, those of other actors. Taliban-ruled Afghanistan seeks regime survival, economic self-

reliance through mining and transit, and international recognition; its tools include territorial control, security guarantees (or threats), and the allocation of contracts and access rights [303, 333]. Its red lines encompass external interference in its governance model, attempts to replace the regime, and demands perceived as fundamentally incompatible with its interpretation of Islamic rule [301, 322, 334]. Its keys, in turn, consist of formal or incremental recognition, significant sanctions relief and access to financial channels, acceptance of the Emirate's internal policies, and assurances regarding regime security [335]. When overlaid with the keys of systemic and regional actors, the matrix reveals a dense web of mutual vetoes: satisfying one actor's conditions frequently violates another's red lines, leaving little overlap in which an integrated, multi-actor corridor could be negotiated.

Analytically, the Geopolitical Rivalry Matrix serves two functions in the dissertation. First, it provides the structured context for the process-tracing in Chapters 3 and 4, allowing the UAP Railway and Mes Aynak cases to be read not as isolated project failures but as manifestations of a broader configuration of competing goals, tools, and keys [22, 232, 233]. Second, it operationalizes the mechanism of the geopolitical lock: the co-existence of structurally embedded great-power rivalry, incompatible regional strategies, and a gatekeeper with its own hard conditions produces a pattern in which economically viable projects stall, alternative routes are systematically promoted, and only narrow, bilateral deals emerge [8, 216, 217]. This is the empirical baseline against which the subsequent chapters assess how, and why, Afghanistan remains locked in managed dissociation rather than transitioning into an integrated regional corridor.

2.5 How Actor Strategies Combine into the Mechanisms of the Geopolitical Lock

The actor mapping in this chapter does more than describe a crowded geopolitical landscape; it clarifies the mechanisms through which Afghanistan's connectivity remains locked and indicates what we should expect to observe in the empirical cases. By specifying each actor's goals, tools, red lines, and keys, the Geopolitical Rivalry Matrix makes visible how structurally embedded rivalry, incompatible conditions, and gatekeeper agency combine to produce a pattern of stalled projects, diversion to alternative routes, and narrow, bilateral bargains rather than integrated corridors [8, 22]. This configuration directly informs the research design for the UAP Railway and Mes Aynak case studies.

For the UAP Railway, the matrix implies a most-likely case for great-power deadlock. Uzbekistan and other Central Asian states have strong economic incentives to realize a trans-Afghan rail link to Pakistani ports, and Pakistan has its own interest in becoming a North-South transit hub [67, 329, 336].

UAP after 2021: from signalling to conditional implementation.

Since 2021, the UAP Railway has progressed through several symbolic and procedural steps that together reveal both the appeal of functionalist connectivity and the persistence of geopolitical locks. The post-2021 trajectory can be summarized in three key episodes:

- On 17 July 2025, Uzbekistan, Afghanistan, and Pakistan signed a framework agreement in Kabul to prepare a feasibility study for a roughly 600-650-kilometre Naziabad-Maidanshahr-Logar-Kharlachi line, with an estimated cost in the range of 4.6-6 billion USD and explicit reference to security and financing as conditions for implementation [67, 329, 337].
- In early 2026, Uzbekistan's president endorsed the trilateral framework agreement and designated the Ministry of Transport as the lead agency for the Trans-Afghan Railway, while officials and analysts highlighted that direct access to Pakistani ports could cut transit times from several weeks to just a few days and reduce logistics costs by around 30-40 percent compared to existing routes via Russia and the Caucasus [67, 329, 338].
- Parallel reporting in 2025-2026 underscored that participating governments and prospective financiers treated the Afghan segment of the line as particularly sensitive, repeatedly stressing that construction and financing would depend on security conditions, compliance with international obligations, and the constraints imposed by existing sanctions regimes, even as technical teams moved ahead with feasibility work and route surveys [238 - 240].

These episodes show how, in the UAP case, functional gains in time and cost did generate diplomatic momentum and early technical work, but only within a framework that from the outset embedded security guarantees, sanctions exposure, and recognition questions as pre-conditions for implementation. In terms of the geopolitical lock-and-key model, great powers and regional states allowed the symbolic door to open through agreements and feasibility studies while keeping the financial and legal locks in place, thereby translating the systemic and regional keys identified in Chapter 2 directly into project-level conditionality.

Under liberal-functionalist expectations, such convergent interests and demonstrated feasibility should push toward implementation. The matrix, however, shows why this has not occurred: U.S. sanctions and normative keys raise financing and compliance risks; China prefers routes that embed Afghanistan within its BRI-CPEC architecture under Chinese security terms; Russia promotes INSTC and related branches designed to maintain its own leverage; and Pakistan's security-heavy keys clash with both Afghan nationalism and India's connectivity vision [7, 8, 339]. In Chapter 3, process-tracing will show how these overlapping strategies and mutually exclusive keys crystallize into concrete blocking moves deferred financing, competing route promotion, and security-related hesitations that keep UAP in a state of prolonged non-implementation despite its economic logic.

For Mes Aynak, the matrix highlights a different mechanism: gatekeeper's constrained agency under sanctions and contested recognition. China, the Taliban, and other actors share an interest in monetizing a major copper deposit, and Taliban-ruled Afghanistan has made resource extraction a centrepiece of its revenue strategy [185, 299]. The rivalry matrix, however, reveals the structural and political limits of this apparent alignment. Chinese keys prioritize stringent security guarantees and contract protection; U.S. and UN sanctions, and associated banking risk, constrain large-scale capital flows; Iran, Pakistan, and Central Asian transit options are themselves

embedded in sanctions-affected or contested corridors; and the Taliban insists on preserving its governance model and securing recognition and sanctions relief as part of any major deal [133, 216, 217]. Chapter 3 will trace how these interacting constraints repeatedly slow, rescope, or symbolically relaunch Mes Aynak, illustrating how the gatekeeper can open specific doors for selected partners without unlocking the broader structural lock [246, 340].

More broadly, the matrix underpins the dissertation's expectation that managed dissociation, rather than full unlocking or complete isolation, is the most likely equilibrium. Systemic actors' incompatible corridor visions, regional rivals' mutually exclusive alignment demands, and the Taliban's own hard keys leave limited space for a grand bargain that would align all keys simultaneously [339, 341]. Instead, the mapping suggests we should observe a proliferation of partial, bilateral arrangements pilot rail segments, limited energy swaps, incremental mining contracts that generate some connectivity and revenue, yet remain vulnerable to external pressure and never coalesce into a unified, multi-actor corridor. The case studies are therefore not only empirical tests of the theoretical model; they are also detailed explorations of how the rivalry matrix translates into specific sequences of decisions, blockages, and partial accommodations in two emblematic projects. Beyond documentary evidence, the dissertation's findings are reinforced by elite interviews and an expert survey. Afghan officials portray 2021 as a turning point that delivered full territorial control, improved security, and new opportunities for engagement with Central Asian states, China, Iran, and Russia, yet they simultaneously acknowledge that sanctions and nonrecognition restrict large-scale financing and formal agreements (A1-A3). External experts and survey respondents, by contrast, repeatedly identify sanctions, financial isolation, governance weaknesses, and regional rivalries rather than technical feasibility as primary obstacles to projects such as the UAP Railway and Mes Aynak, thereby empirically substantiating the geopolitical lock-and-key model's emphasis on external structural constraints and bounded gatekeeper agency (E1-E5, R1-R14).

With this analytical bridge in place, Chapter 3 turns to the UAP Railway as the primary systemic-level test of the great-power deadlock mechanism, situating the project within competing corridor visions and tracing how the lock manifests in practice along the Central Asia-South Asia axis.

3: THE UAP RAILWAY AND MES AYNAK AS EMPIRICAL CASES

This chapter implements Research Task 4 by applying the geopolitical lock-and-key model to the UAP Railway and Mes Aynak cases, using process tracing and primary document analysis to reconstruct the mechanisms sustaining the corridor and project locks.

Afghanistan's post-2021 connectivity politics can be observed most clearly not in abstract regional blueprints, but in concrete projects where competing actors, material incentives, and political conditions intersect. This chapter therefore brings together the dissertation's two core case studies the UAP Railway and the Mes Aynak copper project to test how the geopolitical lock-and-key model operates across different sectors of connectivity and investment.

The chapter builds directly on the theoretical framework in Chapter 1 and the Geopolitical Rivalry Matrix in Chapter 2, which together conceptualize Afghanistan's disconnect as a geopolitical lock sustained by incompatible keys, relative-gains calculations, and bounded sovereign gatekeeper agency. Methodologically, it implements the design outlined in the methodology chapter by combining within-case process tracing with cross-level synthesis: UAP functions as the principal systemic-level test of the lock, while Mes Aynak serves as the principal gatekeeper–investor test under sanctions and non-recognition.

The UAP Railway is the dissertation's clearest test of Corollary 1: Great Power Deadlock. As shown in the existing roadmap and in the Chapter 2 bridge, UAP is a most-likely case for liberal-functionalist expectations: it is technically feasible, economically attractive, and strongly aligned with the interests of Uzbekistan, Afghanistan, and Pakistan, with repeated estimates suggesting substantial reductions in transit time and transport costs if the corridor were completed. Yet the project remains unbuilt on Afghan territory despite framework agreements, feasibility work, and sustained diplomatic signalling, indicating that as the corridor becomes more strategically consequential, competing great-power and regional visions reinforce the lock rather than unlock connectivity.

Mes Aynak, by contrast, is the dissertation's core test of Corollary 2: Gatekeeper's Constrained Agency and a key source of evidence for Corollary 3: Managed Dissociation. The project pairs a commercially significant copper deposit with a major Chinese investor and a post-2021 Taliban administration eager for revenue, recognition, and visible economic success, making it another strong candidate for implementation under shared material incentives. Yet, Mes Aynak has remained suspended between symbolic relaunch and incomplete activation because the Taliban's gatekeeping power is real but bounded by sanctions, banking restrictions, reputational concerns, contractual uncertainty, and the regime's own ideological and governance limits.

Taken together, the two cases illuminate different dimensions of the same geopolitical lock. UAP reveals how an integrated trans-Afghan transport corridor is blocked at the level of systemic and regional rivalry, where corridor design, finance, security, and maritime endpoints become objects of competitive denial among the

United States, China, Russia, Pakistan, India, Iran, and the contiguous Central Asian states. Mes Aynak reveals how, even where a narrower bilateral bargain appears possible, the sovereign gatekeeper cannot convert territorial control and strong economic incentives into full project realization under conditions of non-recognition and sanctions, producing a pattern of selective, fragmented, and reversible engagement rather than full unlocking.

The chapter proceeds in five parts. Section 3.2 examines the UAP Railway as the principal test of great-power and regional deadlock along the Central Asia-South Asia axis. Section 3.3 then provides an analytical bridge from corridor-level rivalry to gatekeeper-level bargaining. Section 3.4 analyses Mes Aynak as the key test of constrained gatekeeper agency under a structural financial and political lock. Section 3.5 compares the two cases systematically, and Section 3.6 draws out the chapter's broader implications for the argument that Afghanistan's most plausible connectivity outcome is not integrated regional unlocking, but managed dissociation.

3.1 The Corridor Lock and the UAP Railway

This section uses the UAP Railway as the primary empirical test of Corollary 1 (Great Power Deadlock) and of the systemic and regional rows of the Geopolitical Rivalry Matrix developed in Chapter 2. By tracing how the United States, China, Russia, Pakistan, and India deploy their respective tools and keys around a seemingly high-gain corridor, it examines why functionalist expectations of cooperative implementation give way to stalled but still viable connectivity along the Central Asia-South Asia axis [22, 342, 343].

The North-South axis as the key corridor prize

In principle, a trans-Afghan railway connecting Uzbekistan to Pakistani ports via northern and central Afghanistan offers one of the shortest and most direct overland routes from Central Asian producers to global markets. Feasibility work supported by regional governments and multilateral or technical partners indicates that such a route could significantly reduce transit times and transport costs relative to existing options through Russia, the Caucasus, or Iran [65, 66, 95].

From a functionalist perspective, UAP is a textbook most-likely case for cooperative integration. It promises diversified export outlets and lower logistics costs for landlocked Central Asian economies, transit revenues and employment for Afghanistan, and enhanced trade and strategic centrality for Pakistan as a hub between Central and South Asia [136 - 138]. Initial studies and official or semi-official estimates suggest that a completed line could cut transit times from several weeks to three-five days and reduce transport costs by up to 40 per cent, with indicative potential freight volumes in the range of tens of millions of tons per year once fully operational [65, 344]. Under liberal functionalist expectations, such strong absolute gains and evident complementarities should over time, overpower political frictions and lead to implementation.

Yet, as of the mid-2020s, the Afghan segment of UAP remains unbuilt. Despite trilateral declarations, signed framework agreements, and parliamentary or presidential approval of feasibility work in Uzbekistan, no track has been laid in Afghan territory,

and no comprehensive financing and security package has been agreed [65, 345, 346]. Instead, UAP has become entangled in a dense web of great-power rivalry, regional competition, sanctions, and recognition disputes that collectively raise the political and financial costs of implementation [136-138]. In the terms of the geopolitical lock-and-key model, the project sits at the intersection of structural lock indicators (L_1 stalled viability, L_2 alternative route promotion, L_3 blocking statecraft), incompatible keys, and bounded gatekeeper agency.

Analytically, this section uses UAP to test Corollary 1 (Great Power Deadlock): the proposition that when an integrated corridor would significantly shift regional balances of influence, rival actors deploy statecraft tools to block or delay it, preferring frozen fragmentation to a configuration that disproportionately advantages a competitor [12, 13]. If the corollary holds, we should observe that, as UAP becomes more strategically consequential, systemic and regional actors harden their positions and raise the cost of implementation through sanctions, competing corridor promotion, security conditionality, and contestation over maritime endpoints, even when they acknowledge the project's economic appeal [65, 347].

The UAP Railway, often described as the core Trans-Afghan Railway, is planned as a North-South line linking Uzbekistan to Pakistan via central Afghanistan. According to tripartite framework agreements and memoranda signed in Kabul in July 2025, the agreed route runs from Termez in Uzbekistan to Naibabad and then via Maidan Shahr and Logar to the Kharlachi crossing into Pakistan's Kurram district, with some earlier documents and commentary still referring to an alignment via Kabul [65, 272]. Planned length figures for the Afghan segment range roughly between 573 km and about 681-760 km, depending on whether only the new build inside Afghanistan is counted or the broader corridor sections are included [348-350]. The line is envisaged with 1,520 mm gauge to integrate with existing Uzbek and northern Afghan networks, with later gauge-transition solutions required on the Pakistani side.

Cost estimates have evolved as the project has been refined. Initial figures of around 4.6-4.8 billion USD in early Uzbek and multilateral discussions have risen in some reporting to 6-7 billion USD as security, terrain, and inflation are factored in [67, 329]. The three governments have agreed to a joint feasibility study and established a trilateral project office and coordination mechanisms to refine technical design, financing models, and implementation schedules, with target completion dates ranging in official and media discourse from about 2027 to the early 2030s [65, 272]. At the time of writing, however, no physical construction has begun on the main new-build Afghan segment, underscoring the gap between planning and implementation that this chapter seeks to explain [65].

Having outlined the route and basic technical parameters, the next subsections turn to the systemic-level actors whose tools and keys decisively shape whether UAP can move from feasibility to construction.

The United States - support in principle, constraint in practice. For Washington, the idea of a North-South route connecting Central and South Asia has long appeared attractive in policy documents as a means of promoting regional integration, economic diversification, and reduced dependence on Russia [22]. U.S. support for initiatives

such as CASA-1000 and the broader "New Silk Road" concept reflected an interest in linking Central Asia southward to Indian Ocean markets [351]. In principle, the UAP Railway especially if connected to Indian markets through Pakistan or via onward links could align with U.S. objectives of enhancing Central Asian connectivity and limiting Russian and Chinese monopolies on transit [14, 22].

In practice, however, U.S. policy toward the Taliban and toward Chinese and Russian influence imposes binding constraints on UAP. The counterterrorism sanctions regime, control over Afghan reserves, and the chilling effect on multilateral and private finance discussed in previous chapters make it difficult for international banks and major development institutions to underwrite a large trans-Afghan rail project while Taliban-ruled Afghanistan remains unrecognized and subject to extensive restrictions [20]. Any attempt by China, Russia, or Pakistan to finance and build UAP at scale inevitably raises questions about exposure to U.S. secondary sanctions and compliance risks, which can deter Western-linked construction firms, insurers, and financiers [352, 353]. In terms of the model, this behaviour corresponds to L_3 (blocking statecraft) and to the enforcement of U.S. keys centred on counterterrorism and governance conditions, which together increase the cost of moving UAP from feasibility to implementation.

Analytically, the U.S. stance embodies indirect denial rather than active sponsorship or outright veto. Washington rarely opposes UAP in public; instead, through the combination of sanctions, cautious engagement with Central Asia, and support for alternative corridors that bypass Afghanistan and Russia such as the Middle Corridor across the Caspian it creates an environment in which moving UAP from feasibility to construction is structurally difficult [231, 354, 355]. In terms of the geopolitical lock-and-key model, U.S. policy generates a pattern of L_2-type moves (promotion of alternative routes) alongside L_3 blocking statecraft, raising the cost of any configuration of UAP that would significantly expand Chinese or Russian leverage without offering a clear, sanction-compatible path to implementation through Taliban-ruled Afghanistan.

China - between CPEC extension and risk management. For China, a functioning trans-Afghan railway is both an opportunity and a risk. On the opportunity side, UAP or a broader Trans-Afghan Railway can be framed as an eastern branch of the BRI, connecting Central Asia into the CPEC and onward to Gwadar [356, 357]. Such a configuration would deepen China's role as a principal architect of Eurasian land routes and could reinforce the Gwadar hub as a competing outlet to Iranian and Indian-linked corridors via Chabahar [7, 356]. Chinese and European analysts have highlighted how a Trans-Afghan route could offer Central Asian exporters a shorter path to the sea while embedding them in Chinese-financed infrastructure and logistics networks [358-360].

On the risk side, however, Beijing remains acutely aware of the security and sanctions exposure associated with investing in Taliban-ruled Afghanistan. Chinese engagement since 2021 has been selective and cautious, with limited capital commitments compared to CPEC inside Pakistan or major BRI projects elsewhere [361, 362]. Extending CPEC through UAP would require not only major capital outlays in a high-risk security environment, but also navigation of U.S. and UN sanctions,

reputational concerns, and potential tensions with Russia and Iran over corridor routing [358-360]. These considerations have so far kept Chinese involvement in UAP largely at the level of rhetorical support, diplomatic signalling, and exploratory engagement rather than concrete financing or construction [361].

From the perspective of the geopolitical lock, China's position generates ambiguous signals for UAP. Beijing benefits if a Trans-Afghan Railway enhances BRI and CPEC and pulls Central Asia closer into Chinese-led connectivity, but it is unwilling to carry the full political and financial burden of building and securing the Afghan segment under current conditions [361]. It therefore maintains UAP as a potential option while prioritizing more controllable routes such as China-Central Asia–Russia/Europe links and CPEC inside Pakistan contributing to the pattern of prolonged feasibility without decisive implementation [7, 356]. In terms of indicators, China's behaviour around UAP mainly generates L_2 (alternative route promotion) and reinforces its own security-centred key, which demands robust guarantees and sanctions-resilient investment protection [341, 361].

Russia - integrating UAP into a broader INSTC geometry. Russia interprets the Trans-Afghan Corridor, including UAP, primarily through the lens of its post-Ukraine sanctions reorientation and INSTC expansion. Moscow's intensified focus on reaching the Indian Ocean via Iranian ports and the Caspian has elevated INSTC as a strategic priority, and Russian and regional commentators increasingly describe the Trans-Afghan Railway as an eastern offshoot of that corridor, potentially linking Central Asia and Russia more directly to Pakistan and beyond [198, 199, 226]. Russian and Uzbek transport authorities have signed documents to advance Trans-Afghan routes, and Russian officials have commissioned freight forecasts for the corridor, with preliminary estimates of 8-15 million tons annually [238 - 240].

At the same time, Russia's integration of UAP into INSTC comes with path-dependent preferences. Moscow wants any Trans-Afghan route to reinforce, not undermine, its own dominant role in Eurasian transit, which means favouring configurations that tie UAP into a Russia-Central Asia-Iran-India geometry rather than a purely China-centric BRI/CPEC network [198, 199, 363]. Russia is also sensitive to security risks along the Afghan border and therefore supports trans-Afghan projects only insofar as they do not destabilize its Collective Security Treaty Organization perimeter or empower actors it views as hostile [238, 239, 240]. These preferences can generate friction with both Chinese corridor proposals and U.S.-backed alternatives, as each power seeks to shape how, and under whose rules, Central Asia connects to the sea [198, 199, 238].

In mechanistic terms, Russia's stance toward UAP exemplifies conditional facilitation. Moscow is willing to support feasibility work, participate in coordination, and rhetorically back a Trans-Afghan route, but only under conditions that preserve its influence and align with INSTC's broader architecture [363]. When competing visions such as a strongly China-dominated CPEC extension or a configuration privileging Chabahar and India appear to sideline Russian interests, Moscow's support becomes more hesitant, reinforcing the structural lock rather than breaking it [198, 199, 238]. In indicator terms, Russia's stance corresponds primarily to L_2 (alternative route

promotion) through its emphasis on INSTC-centric geometries, combined with a routing key that favours Trans-Afghan configurations reinforcing Russian leverage and security preferences [198, 199].

Implications - UAP as a focal point of great-power deadlock. Taken together, these three visions explain why UAP, despite its compelling economic rationale, has remained suspended between political endorsement and material realization. The United States prefers a southward diversification of Central Asia's outlets but is unwilling to normalize Taliban-ruled Afghanistan or accept a Chinese- or Russian-led trans-Afghan corridor that might consolidate rival influence [215, 354]. China sees strategic merit in integrating UAP into CPEC but is deterred by security, sanctions, and the risk of colliding with Russian and Iranian preferences [361]. Russia seeks to fold Trans-Afghan routes into a larger INSTC-centric geometry but remains wary of arrangements that either marginalize its role or destabilize its security perimeter [198, 199, 238].

In the language of the geopolitical lock-and-key model, UAP has become a corridor where all three great powers' keys clash. Any configuration that would significantly advantage one actor for example, a fully China-financed UAP extension of CPEC to Central Asia, or a U.S.-favoured variant more tightly integrated into an India-Chabahar-Central Asia axis tends to trigger blocking behaviour by others [7, 363]. The result is neither outright cancellation nor steady progress, but a pattern of memoranda, feasibility studies, and periodic diplomatic pushes that never coalesce into a binding, financed, and secured construction phase [65].

The next section turns from systemic dynamics to the regional core Pakistan, India, Iran, and the contiguous Central Asian states to show how port rivalries, security keys, and sanctions-mediated financing further entrench the corridor lock around UAP.

UAP Corridor - Country-Segment Profile, Construction Status, and Technical Standards. The three-country structure of the UAP Railway means that its prospects depend not only on the Afghan segment in isolation but on the physical, institutional, and financial conditions prevailing across each national section. Table 3.1 below disaggregates the corridor by country, drawing on the July 2025 trilateral framework agreement, ADB feasibility documentation, and Uzbek Ministry of Transport reporting [65, 66, 95]. The table reveals a striking asymmetry: the Uzbek segment rests on existing and functioning infrastructure, the Pakistani segment relies on a partly operational but underfunded network, and the Afghan segment-the corridor's strategic heart-requires construction of approximately 573-760 km of entirely new track through some of Central Asia's most difficult terrain, with zero kilometres built as of mid-2026.

Table 3.1. UAP Railway: Country-Segment Profile (Primary sources marked)

Dimension	Uzbekistan Segment	Afghanistan Segment	Pakistan Segment	Key Sources	Afghan Implications
Route endpoints	Termez → Hairatan (Uzbek–	Hairatan → Naibabad → Maidan	Kharlachi (Kurram district) →	ADB 2023; International Railway	Afghan segment is the longest, most challenging, and

Dimension	Uzbekistan Segment	Afghanistan Segment	Pakistan Segment	Key Sources	Afghan Implications
	Afghan border)	Shahr → Logar → Kharlachi border crossing	Peshawar → Karachi / Gwadar	Journal 2025; Trackopedia 2025	only fully unbuilt section; without it the corridor does not function.
Approx. length (new build)	~80 km (existing Termez spur; operational)	**~573-760 km entirely new build; 0 km completed as of 2026**	~570 km partly existing Pakistani Railways network; upgrade needed	ADB 2023; News Central Asia 2021, 2025; Tashkent Times 2025	Afghanistan must build the entire central spine; failure to do so blocks the corridor regardless of Uzbek or Pakistani readiness.
Construction status (2026)	Existing rail operational; feasibility and presidential ratification complete (Feb. 2026)	**Zero track laid; framework agreement signed July 2025; feasibility study ongoing**	Existing network operational but gauge-transition infrastructure required at border; upgrade planning underway	International Railway Journal 2025; Uzbekistan MoT 2025; Interfax 2026	The gap between Uzbek ratification and Afghan non-construction is the clearest empirical marker of L_1 (stalled but viable) in the Afghan context.
Gauge standard	1,520 mm Soviet broad gauge; existing	1,520 mm north; gauge-conversion facility required at Kharlachi / Afghan-Pakistan border	1,676 mm British colonial broad gauge; standard on Pakistani Railways	International Railway Journal 2025; B-A 2025; UNECE TER Reports	Afghanistan must host the gauge-conversion facility, a costly chokepoint entirely dependent on Afghan institutional capacity and security.
Principal obstacles	Gauge mismatch with Pakistani side; financing for upgrades	Security (ISKP, TTP); sanctions and non-recognition blocking multilateral finance; terrain (Hindu Kush); corruption; institutional	TTP activity in Kurram; Baloch insurgency near CPEC; port rivalry (Gwadar vs. Chabahar)	ADB 2023; ICG 2025; Durso 2025; Avdaliani 2025; UN-ESCAP 2024	All six obstacles concentrate in the Afghan segment, compounded by sanctions; no other segment faces this combination.

Dimension	Uzbekistan Segment	Afghanistan Segment	Pakistan Segment	Key Sources	Afghan Implications
		capacity; Taliban-ruled Afghanistan recognition gap			
Cost estimate (segment)	Relatively modest (uses existing network)	USD 4.6-7 billion total project (Afghan segment accounts for majority of new-build expenditure)	Upgrade and gauge-transition costs (partial)	ADB 2023; SpecialEurasia 2025; Tashkent Times 2025	Afghanistan would need to attract or guarantee most of the corridor financing, impossible under current sanctions and non-recognition.

Table 3.1 sources: ADB (2023) [primary]; Uzbekistan Ministry of Transport (2025) [primary]; International Railway Journal (2025); Special Eurasia (2025); News Central Asia (2021, 2025); Tashkent Times (2025); B-A (2025); ICG (2025); UN-ESCAP (2024) [primary]. Primary sources marked.

The gauge incompatibility problem and its Afghan implications.

The most technically complex constraint embedded in Table 3.1 is the gauge discontinuity at the Afghan-Pakistan border. The existing Uzbek and northern Afghan network operate on the 1,520 mm Soviet broad gauge; Pakistan Railways uses the 1,676 mm British colonial broad gauge. Any through-running freight must either be transferred between wagons at a border transshipment facility, use variable-gauge axles, or pass through a gauge-conversion yard. Each solution adds time, cost, and infrastructure. A gauge-conversion yard at Kharlachi or a nearby Afghan location would itself require significant capital investment, specialist technology, and sustained operational management over decades, all of which fall on the Afghan side of the border [65, 272]. UNECE Trans-European Railway compatibility studies and ADB technical annexes identify gauge conversion as one of the primary sources of cost uncertainty for the corridor, with estimates of conversion-yard construction ranging from several tens of millions to over USD 100 million depending on capacity and technology choices [23]. For Afghanistan, which currently lacks any functioning broad-gauge conversion facility and whose transport-ministry capacity is severely constrained, this technical chokepoint represents a compounded liability: it is simultaneously a financial burden, an operational vulnerability, and a negotiating leverage point that Pakistan and other actors can exploit to shape how the corridor functions once built.

Customs, transit procedures, and the missing Afghan institutional layer.

Beyond the physical gauge problem, the UAP corridor requires a functioning multi-country customs and transit-facilitation regime that is currently absent. Uzbekistan is a signatory to UNECE TIR conventions and participates in CAREC

corridor management frameworks; Pakistan operates its own customs administration under the Afghanistan-Pakistan Transit Trade Agreement. Afghanistan under Taliban-ruled Afghanistan operates outside most of these multilateral frameworks: it is not a party to updated TIR arrangements, its customs data are not systematically shared with regional partners, and its border-management infrastructure at Hairatan and at planned southern crossings is under-equipped for the scale of flows a functioning UAP corridor would generate [364]. Regional coordination bodies such as CAREC have repeatedly flagged the Afghan institutional gap as a primary non-physical constraint on corridor progress [23]. In practical terms, this means that even if construction finance were available and gauge conversion resolved, freight moving through the Afghan segment would face prolonged customs dwell times, inconsistent duty treatment, and uncertain enforcement of transit agreements, all of which would erode the very time and cost advantages that justify the corridor's construction. From the perspective of the geopolitical lock-and-key model, this institutional gap reinforces the structural lock: it provides external actors with a further rationale for delaying commitment, and it gives Afghan authorities an additional bargaining instrument that cannot be exercised without the broader sanctions and recognition environment improving.

Project profile and economic logic

Economic logic and expected gains. Despite these uncertainties, the economic logic of UAP is consistently portrayed as compelling in Uzbek, Pakistani, and regional planning documents. The line is expected to cut cargo transit time between Uzbekistan and Pakistani ports from roughly 30-35 days on existing multimodal routes to about 3-7 days once the rail corridor is fully operational [67, 235, 329]. Estimates by Uzbek, Pakistani, and Russian officials suggest that transport costs on key routes could fall by around 30-40 per cent, with some scenarios indicating that container costs on the Trans-Afghan leg could drop from roughly 900 USD to around 280-300 USD [67, 329, 365]. These gains derive from shorter distances, fewer transshipment points, and more predictable rail schedules compared to existing combinations of road, rail, and sea via Russia, the Caspian, and Iran [238-240].

Projected freight volumes underscore the scale of anticipated benefits. Official statements and analytical reports commonly cite an initial capacity of up to about 15-20 million tons per year, with some optimistic scenarios envisioning eventual throughput in the 35-40-million-ton range as the corridor matures and connects to broader Eurasian networks [345, 346, 366]. Russian estimates separately envisage 8-15 million tons of Russian cargo per year moving along the corridor once it becomes competitive [337]. For landlocked Central Asian states, this would provide a significant additional outlet for commodities such as fertilizers, metals, grain, and manufactured goods to South Asian and Middle Eastern markets, while also offering import channels for energy, consumer products, and industrial inputs [238-240].

From Uzbekistan's perspective, UAP is a cornerstone of its strategy to become "land-linked" rather than landlocked. By reducing transit times and costs to Arabian Sea ports, the railway promises to improve the competitiveness of Uzbek exports and to attract investment into logistics, warehousing, and value-added processing along the corridor [336, 345, 346]. For Pakistan, UAP would cement its role as a North-South

hub, bringing new cargo flows to Karachi and Gwadar and generating transit fees, port revenues, and associated economic activity [67, 329, 367]. Pakistani officials and commentators highlight the project as a "new trade artery" that could strengthen Pakistan's position in regional value chains and offer a tangible economic dividend from closer ties with Central Asia [367, 368].

For Afghanistan, the projected gains are both direct and indirect. Directly, the railway would generate employment during construction and operation, transit revenues from freight and passenger traffic, and opportunities for ancillary services such as logistics, maintenance, and warehousing [67, 226, 329]. Indirectly, improved connectivity could reduce transport costs for Afghan producers, integrate Afghan markets more closely with regional supply chains, and increase the commercial viability of mineral and agricultural exports by lowering the cost and risk of reaching seaports [98, 336]. Some estimates suggest that, if fully utilized, transit fees and related activities along the Trans-Afghan corridor could yield revenues on the order of hundreds of millions of dollars per year, a significant sum relative to Afghanistan's current domestic revenue base [226].

UAP after 2021, from diplomatic signalling to conditional implementation. Since the Taliban's return to power, the UAP Railway has evolved from a largely aspirational concept into a more structured, if still highly conditional, project. The post-2021 trajectory can be summarized in three key episodes.

First, on 17 July 2025, Pakistan, Afghanistan, and Uzbekistan signed a framework agreement in Kabul for a joint feasibility study on the Naibabad-Kharlachi rail link under the UAP / Trans-Afghan Railway Corridor, laying the basis for a comprehensive assessment of the technical, economic, environmental, and logistical viability of the Afghan segment [136-138].

Second, reporting from 2025 and early 2026 indicates that the planned route would cover roughly 647-681 kilometres through Afghanistan along the Termez-Naibabad-Maidan Shahr-Logar-Kharlachi axis, with a preliminary cost estimate of around 4.6-4.8 billion USD and expectations that it could cut Uzbekistan-Pakistan transit times from about 30-35 days to 3-5 days and significantly reduce freight costs [252, 286, 345].

Third, in February 2026, Uzbekistan's president ratified the framework agreement, formally designating the Ministry of Transport as the competent authority for implementation and directing it to notify Kabul and Islamabad of the completion of domestic procedures, thereby moving the project from political signalling into the preparatory phase of technical and economic feasibility work [68, 337].

These episodes show that UAP has advanced beyond rhetorical maps and vision documents to the point of signed agreements, designated implementing agencies, and planned feasibility studies, reflecting the strength of functional incentives for a shorter, cheaper North-South route [226, 345, 346]. At the same time, official statements and media coverage consistently frame the project's implementation as contingent on "security conditions," "international obligations," and the broader sanctions environment, indicating that the systemic financial and legal locks identified in Chapter 2 have been built into the design of the feasibility process itself [286, 369].

Economic Viability Assessment, Cost, Benefit, and the Afghan Stake. The ADB feasibility baseline. The most authoritative public assessment of the UAP Railway's economic rationale is the ADB's 2023 feasibility study, which examined the Central Asia-South Asia corridor and provided the primary empirical foundation for subsequent trilateral negotiations [23]. The study confirmed that a rail link connecting Uzbekistan to Pakistani ports via Afghanistan is technically viable and generates a positive economic rate of return under conservative traffic assumptions, provided that the Afghan segment is constructed and security conditions are manageable. Key findings cited across official Uzbek, Pakistani, and ADB documentation include: total project costs in the range of USD 4.6-6 billion (with engineering contingencies for the Afghan mountain segment potentially pushing this toward USD 7 billion); expected transit-time reduction from approximately 30-35 days to 3-7 days by sea-and-rail compared to existing routes via Russia and the Caspian; and estimated logistics-cost reductions of 30-40 per cent on relevant trade routes, with container costs on the Trans-Afghan leg potentially falling from approximately USD 900 to USD 280-300 per unit [23, 67, 329].

World Bank trade-flow projections and Afghanistan-specific gains. World Bank trade and transit studies for the region complement the ADB feasibility findings by situating UAP within Afghanistan's broader economic vulnerability [90, 91]. Afghanistan currently generates very limited transit revenue: cross-border trade volumes are a fraction of estimated potential, and the country's import costs are among the highest in the region due to dependence on costly road transport and on a small number of controlled border crossings [90]. A functioning UAP corridor would change this calculus in three concrete ways for the Afghan segment specifically. First, transit fees: at a freight volume of even 5-10 million tonnes per year, well below the corridor's design capacity of 15-20 million tonnes, Afghanistan could generate transit revenues on the order of USD 200-500 million annually, depending on the fee structure negotiated in the multilateral corridor agreement [23, 226]. For comparison, Afghanistan's total domestic revenue in 2023 was estimated at approximately USD 1.8-2 billion, meaning that even modest UAP transit fees would represent a material share of state income [90, 370, 371]. Second, import-cost reduction: lower rail freight rates would reduce the landed cost of essential goods in Afghanistan, including food, fuel, and industrial inputs, partially compensating for the country's landlocked premium. Third, mineral export viability: cheaper and faster rail access to seaports would sharply improve the commercial viability of extracting and exporting Afghanistan's mineral wealth, including copper from Mes Aynak and iron ore from Hajigak, deposits that are currently uneconomic partly because of prohibitively expensive overland transport to distant ports [23].

Chamber of Commerce and private-sector perspectives. Regional Chambers of Commerce in Afghanistan, Uzbekistan, and Pakistan provide a private-sector dimension to the economic case that official feasibility studies often understate. The Afghan Chamber of Commerce and Industry has consistently identified transport cost as the single largest non-tariff barrier to Afghan exports, estimating that Afghan traders pay two to three times the average South Asian logistics cost per unit of exported goods

[372]. Uzbek business associations have highlighted that UAP would open Central Asian fertiliser and metals producers to South Asian markets at significantly lower cost than current Russian or Caspian routes, with particular benefit for Uzbekistan's chemical and agribusiness sectors [211]. Pakistani industrial federations, for their part, note that corridor completion would provide Pakistani port operators and logistics firms with new northbound cargo, improving utilization rates at Karachi and Gwadar and potentially generating thousands of direct and indirect jobs in the Khyber Pakhtunkhwa border economy [373]. These Chamber of Commerce assessments, while commercially motivated, reflect on-the-ground business conditions that complement the aggregate ADB and World Bank economic modelling and lend additional weight to the view that the principal obstacle to UAP is not demand-side weakness but the structurally constrained supply of finance and political will analysed throughout this chapter.

IMF macroeconomic context: why the corridor matters for Afghan fiscal stability. IMF Article IV consultation reports and regional economic outlooks situate UAP within Afghanistan's macroeconomic crisis. Following the 2021 transition, Afghanistan's GDP contracted sharply, foreign-exchange reserves were frozen, the banking system collapsed, and aid inflows fell dramatically [90, 370, 371]. Against this backdrop, transit revenues and mineral royalties from corridor-linked projects represent not a marginal supplement to the budget but a potential structural transformation of state revenue. The IMF notes that without access to new domestic revenue streams, Taliban-ruled Afghanistan faces a persistent fiscal gap that drives reliance on informal taxation, mineral licensing at below-market terms, and opium-sector toleration as implicit revenue sources [370, 371]. A corridor-enabled revenue stream of the magnitude projected by ADB and World Bank studies would, in theory, allow a gradual transition away from these distortionary instruments, though the IMF also warns that without improvements in financial-sector governance and AML/CFT compliance, new resource revenues risk perpetuating rather than reducing Afghanistan's fiscal fragility [91, 370]. This institutional caveat reinforces the dissertation's argument that economic viability is a necessary but insufficient condition for corridor realization: the geopolitical lock must be addressed simultaneously for the economic potential of UAP to translate into Afghan fiscal stability.

Summary: a compelling economic case blocked by political conditions. Taken together, the ADB feasibility baseline, World Bank trade projections, Chamber of Commerce assessments, and IMF macroeconomic context converge on a single conclusion: the UAP Railway is economically compelling, particularly for Afghanistan, and its absence imposes measurable costs on all three participating countries. This economic consensus makes UAP an especially strong test of the dissertation's theoretical claims. A liberal-functionalist framework, which predicts that actors will eventually cooperate when shared gains are large and demonstrated, would predict implementation under these conditions. The geopolitical lock-and-key model, by contrast, predicts that precisely where strategic stakes are high and gains are real, rival actors will deploy statecraft tools, sanctions, financing withheld, route alternatives promoted, to prevent a configuration that advantages a competitor. The subsequent

mechanisms section demonstrates which prediction better fits the observed pattern of stalled but viable connectivity (L_1 in the indicator set).

Why the UAP Stalls

Drawing on the actor profiles and keys set out in Chapter 2 and the post2021 trajectory outlined above, this section traces how systemic and regional rivalries convert UAP's compelling economic logic into a pattern of stalled but viable connectivity [22, 374]. Rather than treating delays as mere implementation problems, it examines how the United States, China, and Russia, together with Pakistan and India, deploy their respective tools and keys around the project through sanctions, conditional financing, alternative route promotion, and port competition to preserve relative gains and prevent rivals from consolidating control over a functioning Trans-Afghan corridor [22]. Despite its strong economic rationale, the UAP Railway has stalled at the point where finance, sanctions, and security intersect, as banks and multilateral lenders remain unwilling to fund construction through a sanctioned, non-recognized regime, and key investors and governments treat security risks along the route as insurmountable without political arrangements that currently do not exist [245, 375, 376].

Sanctions, banking risk, and recognition gaps. At the core of the financing problem is the sanctions-driven fragility of Afghanistan's financial system under Taliban rule. U.S. and UN sanctions on Taliban leaders and designated entities, combined with the freezing of Afghan central bank reserves and the collapse of normal correspondent banking relations, have produced a high-risk environment for any large-scale financial flows into the country [93, 375, 376]. Even where humanitarian and basic commercial transactions have been formally licensed and new general licences have clarified the scope of permissible activity, international banks have remained deeply reluctant to process Afghan-related payments, citing legal uncertainty, AML/CFT concerns, compliance costs, and reputational risk [376-378]. This risk aversion extends to potential project finance for infrastructure: a multi-billion-dollar rail project through Taliban-controlled territory would require long-term commitments from institutions that are currently unwilling to take Afghanistan exposure at scale [375].

This banking reluctance is reinforced by the ambiguous recognition status of the Taliban government. While Uzbekistan, Pakistan, and other regional states have signed agreements and maintained close political ties with Taliban-ruled Afghanistan to move UAP forward, most Western governments and multilateral lenders still treat the Taliban as de facto, not de jure, authorities, and the UN Credentials Committee has not seated Taliban representatives as Afghanistan's legitimate government [22, 309, 310]. This liminal status creates legal uncertainties about who can sign binding sovereign guarantees, how disputes would be arbitrated, and whether contracts would be enforceable in foreign courts. For development banks and export credit agencies, these uncertainties translate into serious constraints on lending mandates, especially when combined with AML/CFT concerns and pressure from major shareholders wary of appearing to legitimize the Emirate [93, 376, 377].

Recent steps toward deeper engagement by some actors have not fully resolved this. Russia and several regional states have removed the Taliban from national terrorist lists and intensified economic contacts, and Russian officials openly discuss integrating the Trans-Afghan Railway into the INSTC geometry, but such moves do not, by themselves, unlock financing from institutions exposed to U.S. or EU jurisdictions [198, 199, 379]. As a result, even when Uzbekistan and Pakistan publicly commit to UAP and approve feasibility agreements in their parliaments, they lack access to the cheap, long-tenor capital usually needed for such projects, and private investors are discouraged by the combination of sanctions risk, legal uncertainty, and low creditworthiness on the Afghan side [65].

In indicator terms, these dynamics exemplify L_1 (stalled but viable connectivity) and L_3 (blocking statecraft): positive feasibility and demand coexist with sanctions, recognition gaps, and compliance risk that deter the very financiers needed to move the project into construction.

Security threats along the route. The financing problem is compounded by a multi-layered security environment along the planned route. Inside Afghanistan, the Taliban have improved basic security compared to the pre-2021 civil war period, but they face persistent challenges from ISKP, local armed groups, and criminal networks [136-138]. Analyses of the Trans-Afghan Railway corridor identify several high-risk segments, particularly around Kabul and in eastern Afghanistan, where ISKP presence and the potential for sabotage, extortion, and attacks on construction crews and infrastructure remain significant [232, 233, 380]. For a project that would require extensive tunnelling and bridge-building across the Hindu Kush, even limited insecurity translates into high insurance costs and heightened fears about long-term asset protection [381].

Interview and survey evidence reflects this ambivalent security assessment. Afghan officials A1-A3 insist that the Emirate has restored nationwide security and can guarantee protection for infrastructure such as UAP, presenting the project as an opportunity for shared prosperity under their control. Regional experts, however, remain cautious: several emphasize that while large-scale insurgency has declined, residual ISKP activity, local armed groups, and criminal networks still make long-term asset protection and insurance costly along key segments of the route (E2, E3, R5, R8). This gap between the gatekeeper's self-presentation and external risk assessments helps explain why financiers treat security as a continuing constraint even as some quantitative violence indicators improve.

On the Pakistani side, the security picture is equally fraught. The prospective connection from Kharlachi or other crossings into Kurram district would run through areas affected by Tehrik-e-Taliban Pakistan activity and, further south, by Baloch insurgent groups that have repeatedly targeted infrastructure associated with CPEC and Chinese projects [67, 329, 382]. Pakistan's relations with Taliban-ruled Afghanistan have themselves been volatile, with recurrent border closures, clashes along the Durand Line, and public disputes over the presence of TTP militants on Afghan soil [9, 22]. These dynamics raise doubts among potential financiers and operators about whether

the security guarantees offered by Islamabad and Kabul can be sustained over the decades-long lifespan of a major rail asset.

Security risks also feed back into political risk assessments of great powers. For the United States and its allies, uncertainty about Taliban counterterrorism performance and the presence of ISKP and Al-Qaeda remnants is a central reason to maintain sanctions and avoid large-scale infrastructure engagement [376, 377]. For China, the threat of attacks on Chinese workers and assets, whether by ISKP, TTP, or anti-Chinese militant groups, reinforces its cautious approach to any deep involvement in UAP, especially given its experience with attacks on CPEC infrastructure in Pakistan [361]. For Russia, instability along the southern CSTO flank and fears of jihadist flows into Central Asia make it wary of projects that could become vectors of insecurity as well as trade [272, 383].

Perceptions of the deadlock, evidence from interviews and expert survey. Elite interviews and the expert survey broadly confirm that the UAP Railway is seen as economically attractive but politically and financially "locked." One regional politics expert described Afghanistan as "the bridge between South and Central Asia that under the right management can become a transit centre with multiple trade routes," but stressed that this remains "a theoretical possibility rather than a possible option" because Afghanistan is under Taliban control, not recognized internationally, and governed by ultra-conservative policies that make large-scale engagement difficult. This perception echoes official concerns that recognition and governance norms have become central filters for connectivity decisions under the current sanctions regime.

These views are echoed across other respondents. Several regional experts and survey participants explicitly rank sanctions and financial isolation above physical insecurity as the main barriers to large-scale projects such as UAP, noting that willing regional partners face practical obstacles in moving funds and securing compliance under U.S. and UN regimes (E1, R1, R3, R7). Afghan officials likewise argue that, in the current context, improved security and unified control are not sufficient to unlock investment unless sanctions are eased and the Emirate regains access to formal banking channels (A1-A3). This convergence supports the coding of sanctions and non-recognition as systemic keys that keep UAP in an L_1 condition of stalled but viable connectivity despite strong feasibility indicators.

The same expert emphasized that Taliban-era prospects for corridor integration have "drastically changed into the negative side because of sanctions, lack of recognition from strong players on the world arena and the lack of international financial system," concluding that "because of these restrictions, the possibility of large-scale projects is simply not feasible." Even where regional connectivity continues "in Uzbekistan, Turkmenistan, Iran and Pakistan," it is described as limited and piecemeal, rather than taking the form of integrated, trans-Afghan schemes. This aligns with the geopolitical lock-and-key model's expectation that sanctions and non-recognition function as systemic keys blocking projects like UAP despite positive feasibility assessments.

A Central Asia, focused expert highlighted that major initiatives such as TAPI and UAP are constrained "mainly by financing and sanctions, not by security," noting that

Central Asian states "cannot afford to lose millions in high-risk Afghan projects" and that sanctions complicate financial transfers and require work-arounds such as using Dubai accounts. From this vantage point, the deadlock around UAP is not perceived as a lack of demand or technical know-how, but as a rational response to compounded security and sanctions risk, especially in a context where Afghanistan is de facto governed but not recognized.

Afghan officials, by contrast, portray 2021 as having "brought several opportunities" for connectivity, arguing that Western withdrawal removed regional sensitivities, that the current government exercises "complete control and sovereignty throughout the country," and that "security has been established throughout the country" and corruption reduced. They insist that Central Asian countries, China, Iran, and Russia are interested in investing in railways and transit, and that Afghanistan is ready to negotiate any concerns. This official narrative foregrounds security improvements and sovereign gatekeeping, while external experts stress sanctions, recognition, and financial plumbing as the main constraints an asymmetry that itself illustrates the gatekeeper's bounded agency within the geopolitical lock (A1-A3, E1-E3, R2, R7).

Combined effect, a self-reinforcing deadlock. The combined effect of sanctions, nonrecognition, and security threats is self-reinforcing financing and risk deadlock. Banks and multilateral institutions point to sanctions, AML/CFT concerns, and compliance costs to justify staying away from Afghan-related project finance; security analysts highlight ISKP, TTP, and local spoilers as reasons why even a well-funded project might be difficult to protect; and governments invoke both sets of risks to avoid costly political decisions such as partial sanctions relief or formalized security compacts that would be needed to make UAP bankable [101, 102, 245]. Regional actors like Uzbekistan and Pakistan, while strongly interested in the corridor, lack the fiscal and security capacity to shoulder these burdens alone, and their attempts to bring in external partners are filtered through the broader great-power rivalry described in Section 3.2 [22].

In the terms of the geopolitical lock-and-key model, UAP's financing and security deadlock illustrates how structural locks (sanctions, recognition gaps, security threats) and incompatible keys (U.S. demands for counterterrorism and normative change, Chinese and Russian corridor preferences, the Taliban's insistence on recognition and sanctions relief) interact to neutralize even strong economic incentives. The corridor remains attractive on paper, but each actor's rational response to sanctions exposure and security risk is to delay or hedge rather than commit. Taken together, these dynamics constitute a clear instance of L_3 (blocking statecraft): U.S. and UN sanctions, compliance risks, and reputational concerns elevate the cost of participation for banks, firms, and multilateral lenders, while Taliban-ruled Afghanistan's nonrecognition status prevents the emergence of a robust, internationally backed financing structure [101, 102, 375]. At the same time, clashes among U.S., Chinese, Russian, and Taliban-ruled Afghanistan keys over counterterrorism guarantees, security and contract protection, and recognition and sanctions relief limit the scope for workarounds,

reinforcing the structural lock even where actors acknowledge UAP's economic appeal [361].

UAP as a Most-Likely Case for Liberal Functionalism

In theoretical terms, these parameters make UAP the most-likely case for liberal functionalist predictions: multiple states stand to capture substantial absolute gains, the technical feasibility appears manageable, and the project has been politically endorsed at senior levels in all three participating capitals [22, 336, 345]. Under a framework that assumes economic logic will, over time, push actors toward cooperation, a project with such a strong benefit cost profile and clear complementarities should, once feasibility is established, face diminishing resistance and move steadily toward implementation [22, 343]. The preceding sections have shown, however, how this economic rationale runs into financing, security, and terminal-choice deadlocks, collectively neutralizing the very economic logic that makes UAP attractive on paper [93, 245, 375].

In terms of the geopolitical lock-and-key model, this makes UAP an L_1 case of "stalled but viable" connectivity: economic feasibility is documented, projected gains are substantial, and regional demand is evident, yet implementation of the Afghan segment has not begun [89-91]. As such, UAP provides a stringent test of Corollary 1, since persistent non-implementation under these conditions strongly suggests that systemic rivalry and incompatible keys, rather than underlying technical or demand side deficits, sustain the deadlock. In addition to feasibility studies and official project documents, the analysis of UAP in this chapter draws on original elite interviews and an expert survey that captures how actors interpret these constraints in practice [132, 384].

Read together with the preceding analysis of sanctions, security, and actor perceptions, this makes UAP a stringent empirical test of whether economic rationality can overcome geopolitical rivalry in a contested connectivity space.

The Terminal Dilemma of Gwadar and Chabahar

A final layer of deadlock around the UAP Railway concerns its maritime endpoints. Even if financing, sanctions, and security constraints could be partly managed, the question of whether the corridor should ultimately feed into Pakistan's ports (primarily Gwadar and Karachi) or into Iran's Chabahar port and under which political configurations bring Pakistan-India rivalry and U.S.-China competition directly into the project's design [7, 8, 385]. Expert interviews and survey responses confirm that the choice between Gwadar and Chabahar is perceived as deeply political rather than purely technical. Some respondents stress that routing UAP primarily to Gwadar would be read in India and parts of the West as consolidating a China-Pakistan axis, likely provoking subtle forms of resistance or counter-balancing [380]. Others highlight that over-reliance on Chabahar exposes Central Asian and Afghan trade to Iran's sanctions environment and security problems in Sistan–Baluchistan, making financiers wary of a corridor that depends entirely on a sanctioned port [216, 217]. These perceptions illustrate how, in the eyes of regional elites, UAP's maritime endpoints are tightly bound to incompatible keys held by Pakistan, India, the United States, China, and Iran, reinforcing the terminal dilemma identified by the model.

Gwadar and the CPEC-centric option. Routing UAP primarily toward Gwadar and Karachi would effectively integrate the Trans-Afghan Railway into a CPEC-centric architecture [67, 329, 366]. From Pakistan's perspective, this is the preferred outcome: it would channel Central Asian freight via Pakistani territory, reinforce Pakistan's role as a principal gatekeeper to the Arabian Sea, and potentially boost Gwadar's currently underused capacity [368, 386]. For China, a UAP–CPEC connection would deepen the strategic and economic significance of its investments in Pakistan, turning Gwadar into a more genuinely "Eurasian" outlet and strengthening the BRI's southern maritime linkage [387, 388].

However, a Gwadar-centric configuration raises several geopolitical and sanctions-related concerns. India, which already views CPEC as a violation of its sovereignty because it runs through disputed territory in Gilgit-Baltistan, is unlikely to accept a regional connectivity architecture where Pakistan and China jointly control the main outlet for Central Asian and Afghan trade [7, 389, 390]. U.S. policymakers, wary of expanding Chinese influence and CPEC's strategic role, may perceive a UAP–CPEC link as consolidating a China-led corridor that bypasses India and marginalizes alternative routes via Chabahar, thereby reinforcing their reluctance to ease sanctions or support financing for UAP [391]. For Russia and Iran, a Gwadar-dominated outcome could also be seen as diluting the relative importance of INSTC and Iranian ports in North-South trade, prompting more guarded support for UAP [198, 199].

In terms of mechanism, the Gwadar option maximizes economic synergies with existing CPEC infrastructure but also maximizes political vetoes. It directly clashes with India's connectivity strategy, threatens Iranian ambitions for Chabahar, and heightens U.S. concerns about China's maritime and overland reach [386, 388]. Each of these actors has tools sanctions, diplomatic pressure, and alternative corridor promotion to slow or complicate any movement toward a fully CPEC-integrated UAP [22, 380].

Chabahar and the India-backed alternative. The alternative, frequently invoked in Indian and some Western analyses, is to anchor UAP more explicitly to Chabahar and the India–Iran–Afghanistan corridor. In this scenario, the Trans-Afghan Railway (or a parallel road-rail combination) would connect Central Asia to Chabahar through Afghan and Iranian territory, providing a route that bypasses Pakistan entirely and aligns with India's longstanding goal of securing direct access to Central Asia without transiting Pakistani territory [8, 392]. Such a configuration could, in principle, be more acceptable to India and somewhat more palatable to the United States, which has at times carved out limited sanctions waivers for Chabahar on the grounds of supporting Afghan connectivity and providing alternatives to Chinese-linked routes [391, 393].

Yet the Chabahar option is itself heavily constrained by Iran's sanctions environment and capacity limits. U.S. sanctions on Iran, and the on-again/off-again nature of Chabahar specific waivers, continue to deter many shipping lines, insurers, and banks from fully engaging with the port, and episodes of regional tension involving Iran have periodically driven up risk premiums and disrupted maritime traffic [394]. For Central Asian states and Afghanistan, relying solely on a sanctions affected port introduces its own vulnerabilities and may not provide the robust, scalable outlet

needed to justify multibillion dollar investments in UAP [391, 392]. Moreover, Pakistan and China are likely to resist or counterbalance any configuration that sidelines Gwadar and CPEC, using diplomatic and economic tools to keep Afghan and Central Asian trade flows oriented toward Pakistani ports [22, 386].

Mechanistically, a Chabahar-centric terminal design reduces Indian and some U.S. concerns but amplifies Iranian sanctions risk and Pakistani Chinese opposition [20, 21]. It shifts the primary veto power from India and, to some extent, from the United States to Iran's sanctions exposure and to Pakistan–China's competitive responses, without creating a configuration that all major actors can jointly accept [386, 392].

Hybrid and "multi-terminal" solutions, compromise or complication? Some regional discussions envisage hybrid or multiterminal arrangements, in which UAP and related Trans-Afghan routes would ultimately connect to both Pakistani and Iranian ports, providing shippers with multiple options and allowing states to hedge against any single country's leverage [366, 395]. In principle, such a design could align with Central Asian states' preference for diversification and reduce dependence on any single outlet, making the corridor more resilient to geopolitical shocks [343, 391].

In practice, however, a multiterminal configuration introduces new coordination and governance challenges. It raises questions about how freight would be allocated among different ports, how tariffs and transit fees would be negotiated, and how competing regulatory and sanctions regimes (Pakistani and Iranian, U.S. and EU, Chinese and Russian preferences) would be reconciled [386, 391]. For major powers, a multiterminal arrangement may be seen not as a neutral compromise but as a platform where rivals can compete for control of specific segments and flows, replicating the broader rivalry within a more complex corridor architecture [6, 143, 224]. For the Taliban, managing relationships simultaneously with Pakistan, Iran, India, China, Russia, and the United States around a single multiterminal corridor risks overextension and conflicting obligations, given limited institutional capacity and the Emirate's own hard keys on recognition and sanctions relief [361].

The terminal dilemma as a mechanism of the lock. The terminal dilemma Gwadar versus Chabahar, or some multiterminal variant thus functions as a refining mechanism of the geopolitical lock. Even if sanctions were partially eased and security risks moderated, disagreement over which port complex should anchor UAP keep the project politically contested [22, 343]. Each of the principal terminal choices maximizes veto power for a different set of actors: a Gwadar-centric option triggers Indian and, to a degree, U.S. and Iranian resistance; a Chabahar-centric option is constrained by Iran's sanctions and opposed by Pakistan and China; hybrid options distribute leverage in ways that are complex to govern and potentially unstable [366, 386, 391].

For the purposes of this dissertation, the terminal dilemma reinforces Corollary 1 (Great Power Deadlock) by showing that UAP's blockage is not only about the Afghan segment. The choice of endpoints ties the project into port rivalries and sanctions regimes that are themselves embedded in U.S.-China competition and Pakistan–India conflict [7, 8]. Rather than converging on a single, efficiency-maximizing solution, actors use the terminal choice to defend relative gains and deny rivals strategic

advantage, even at the cost of delaying or forgoing the absolute gains that UAP could generate [22, 386].

In the language of the model, the Gwadar-Chabahar contest is an arena where regional keys collide. Pakistan's key maintaining the primacy of Karachi and Gwadar and limiting an overt Indian footprint is fundamentally at odds with India's key, which requires a viable, Pakistan-free access route to Central Asia via Chabahar [386, 392, 396]. Any UAP configuration that leans too far toward one endpoint risks violating the other side's red lines, further narrowing the space in which a politically acceptable corridor design can be negotiated and reinforcing the overall structural lock [366, 395].

Alternative explanations and their limits

Before drawing conclusions for Corollary 1, the evidence assembled above must be weighed against the principal alternative explanations for UAP's non-implementation, since a stalled project is not, by itself, proof of deliberate geopolitical blockage. Four candidate explanations merit explicit consideration: commercial infeasibility, an insufficient cargo base, security risk taken alone, and Afghan institutional incapacity.

Each of these factors is real, and each appears in the record; none, however, is sufficient on its own, and each generates observable implications that the evidence contradicts. If commercial infeasibility were decisive, the project would not display positive multilateral feasibility assessments, sustained governmental commitment in Tashkent and Islamabad, and continuing survey and framework work; a commercially hopeless project attracts none of these. If the cargo base were the binding constraint, financiers would be demanding traffic guarantees rather than sanctions comfort and legal certainty, yet the documented objections of banks and multilateral lenders centre precisely on sanctions exposure, recognition status, and enforceability. If security alone explained the outcome, the marked improvement in territory-wide security after 2021 should have shifted financing behaviour; it did not, because the financial and legal locks remained in place. And if Afghan institutional incapacity were determinative, comparable projects would proceed wherever Taliban-ruled Afghanistan's administrative role is minimized; instead, even ring-fenced designs that bypass Taliban-ruled Afghanistan institutions advance only in narrow, heavily conditioned forms.

The discriminating pattern is the location of the binding failure point. Across the post-2021 chronology, UAP consistently advances through the stages that depend on economic logic and regional political will, agreements, feasibility work, and surveys, and stalls at the single stage that depends on sanctions-compatible finance and recognized legal counterparties. Commercial, security, and institutional factors operate as real but subordinate constraints that interact with the lock and raise its costs; the lock itself, the incompatibility of systemic and gatekeeper keys expressed through financing and legal channels, is the binding constraint. This is the precise sense in which the dissertation distinguishes deliberate obstruction and structurally produced deadlock from simple implementation failure.

How the UAP Case Confirms Corollary 1

The UAP Railway provides strong support for Corollary 1: Great Power Deadlock. It is a technically plausible and economically attractive corridor, repeatedly advanced through agreements, feasibility work, and diplomatic signalling, yet it remains unbuilt on Afghan territory because its realization depends on the alignment of rival systemic and regional actors whose preferred corridor geometries, political conditions, and strategic priorities do not converge [22, 23, 65].

The case shows that the main barrier is not the absence of economic logic, but the interaction of sanctions, recognition gaps, financing constraints, security concerns, and endpoint rivalry between competing maritime and corridor visions [8, 20, 21]. The United States raises the cost of implementation through sanctions and indirect denial, China treats the corridor as strategically useful but too risky to underwrite decisively, Russia supports only configurations compatible with its wider Eurasian geometry, and Pakistan-India-Iran port competition further fragments the field of viable outcomes [6, 22, 194].

UAP therefore remains best understood as stalled but viable connectivity: a corridor that is repeatedly affirmed in principle but blocked in practice by incompatible keys and relative-gains calculations [12, 20, 23]. This makes it a strong systemic-level confirmation of the geopolitical lock-and-key model and establishes the analytical basis for the next section, which turns from corridor-level deadlock to the more focused gatekeeper-investor bargaining examined through Mes Aynak [141, 185].

3.2 From Corridor Deadlock to Gatekeeper Bargaining

The UAP Railway case demonstrates the geopolitical lock at its most visible systemic scale. It shows that even where a trans-Afghan corridor is supported by strong economic logic, repeated diplomatic signalling, and clear regional demand, integrated implementation can still be blocked when the project becomes strategically entangled with competing great-power corridor visions, regional endpoint rivalries, sanctions exposure, and incompatible political keys. In this sense, UAP substantiates the model's claim that corridor projects with the potential to reshape regional trade geography and strategic influence are especially prone to intensifying relative-gains competition rather than generating functionalist spillover toward cooperation.

Yet the UAP case also raises a further question that cannot be answered at the corridor level alone. If integrated, multiactor transport projects are blocked because too many external actors possess vetoes over finance, security, routing, and recognition, can Taliban-ruled Afghanistan nevertheless use its territorial control to unlock narrower, bilateral forms of economic engagement in sectors where the number of relevant actors is smaller and the material incentives are more concentrated? Put differently, if the North-South corridor remains constrained by systemic and regional deadlock, does the sovereign gatekeeper retain enough bargaining power to activate at least one strategically significant project under the same wider structural lock?

This question shifts the analysis from the architecture of the corridor lock to the problem of gatekeeper agency under constraint. As specified in the theoretical framework, the Taliban's post-2021 position combines unusually strong territorial

control with unusually weak access to international finance, recognition, and institutional legitimacy. Taliban-ruled Afghanistan can grant access to territory, provide or withhold security guarantees, renegotiate contracts, and use projects rhetorically to signal pragmatism and sovereign control, but it cannot by itself alter sanctions regimes, reopen conventional banking channels, eliminate global derisking, or reconcile the incompatible keys demanded by major external actors. The move from UAP to Mes Aynak therefore is not a shift away from the geopolitical lock, but a shift into another layer of the same lock: from multiactor corridor deadlock to the bounded bargaining space available to a sovereign gatekeeper inside that deadlock.

Mes Aynak is particularly well suited for this next step in the analysis. Unlike UAP, which requires broader alignment among multiple states, financing structures, and transport endpoints, Mes Aynak is a more concentrated project built around a high-value resource, a single dominant external investor, and a gatekeeper with direct territorial control over the site. The case therefore provides a critical test of whether bilateral economic convergence between Taliban-ruled Afghanistan and China can overcome the sanctions-shaped and reputational constraints that remain in place even when overt corridor rivalry is less central than in the UAP case. If the gatekeeper can transform control over territory and resources into meaningful project activation anywhere, Mes Aynak is among the most plausible sites where such a transition should be visible.

At the same time, the dissertation's model predicts that even this more favourable setting will not produce full unlocking. Chapter 1 argued that bounded gatekeeper agency, combined with sanctions, banking restrictions, reputational risk, and ideological constraints, should push Afghanistan not toward integrated connectivity, but toward managed dissociation: selective, sector-specific, and politically conditioned forms of engagement that generate limited gains without dissolving the broader structural lock. The evidence already discussed in relation to UAP points in this direction by showing that agreements, feasibility studies, and diplomatic endorsements can accumulate without crossing the threshold into sustained implementation. The Mes Aynak case now allows the analysis to test whether a similar pattern appears under different conditions: not corridor-level stalemate, but partial activation without full-scale realization.

The transition from UAP to Mes Aynak is therefore analytically cumulative. The first case established that the structural lock remains powerful enough to block an economically rational and regionally desired transport corridor at the systemic and regional levels. The second case examines whether Taliban-ruled Afghanistan, as sovereign gatekeeper, can do more than modulate that lock at the project level when dealing with a willing major-power investor and a commercially valuable resource. If Mes Aynak also culminates in a pattern of delay, compartmentalization, and partial movement rather than decisive implementation, then the combined evidence from the two cases strongly supports the broader claim that Afghanistan's post-2021 connectivity trajectory is best understood as managed dissociation rather than unlocking.

3.3 The Gatekeeper's Dilemma Under a Structural Lock

Mes Aynak provides the dissertation's clearest test of Corollary 2: Gatekeeper's Constrained Agency and an important empirical window onto Corollary 3: Managed Dissociation. Unlike UAP, which depends on the alignment of a wide corridor system, Mes Aynak is a more concentrated project centred on a single strategic asset, a major external investor, and the Taliban as sovereign gatekeeper.

This makes the case analytically valuable. If a commercially significant bilateral project with clear material incentives on both sides still fails to reach full implementation, the explanation is unlikely to lie in technical feasibility alone. Instead, the case allows the dissertation to examine how sanctions, financial de-risking, reputational risk, contractual uncertainty, and Taliban-ruled Afghanistan's own governance constraints limit what the gatekeeper can achieve even where territorial control and economic interest appear to favour activation.

The section proceeds from the project's strategic significance and post-2021 revival to the mechanisms that constrain implementation, before examining Taliban-ruled Afghanistan's bargaining strategy and the resulting pattern of partial activation.

The gatekeeper's dilemma and Mes Aynak

In 2008, a Chinese consortium led by MCC and Jiangxi Copper secured a 30-year lease widely valued at around 3 billion USD, with commitments to build associated infrastructure, including a power plant, a possible smelter and railway, substantial upfront payments, and employment and social benefits for local communities [397, 398]. Despite this apparently "win-win" configuration, the project spent more than a decade in limbo due to insecurity, contractual disputes, local opposition, and heritage concerns, and even after the Taliban takeover and renewed engagement since 2022, full-scale extraction has still not begun [227, 397].

Mes Aynak thus represents a most-likely case for functionalist expectations: a large, commercially attractive deposit, a willing major investor, and a central government eager for revenue and recognition. Yet, as the previous chapters have shown, Afghanistan's connectivity and resource politics are structured by a geopolitical lock-and-key dynamic rather than by shared economic interests alone. In this section, Mes Aynak is treated as a critical case to trace how that dynamic operates when a sovereign gatekeeper bargains directly with a great-power investor under sanctions and non-recognition [10, 141, 142].

Similar gatekeeping dynamics appear in other contested or partially recognized policies. Analyses of entities such as Somaliland, Northern Cyprus, and the Kurdistan Regional Government show how de facto authorities can function as quasi-sovereign gatekeepers for trade, pipelines, and offshore activities, even when formal recognition is absent or disputed [399, 400]. In these settings, external actors routinely negotiate security guarantees, transit rights, and revenue-sharing arrangements with the de facto authorities while maintaining legal fictions that treat the parent state as the sole sovereign, underscoring that durable control over corridors and subsoil resources can rest on a mix of recognition, sanctions, and infrastructural leverage rather than formal statehood alone [401].

Mes Aynak under Taliban-ruled Afghanistan

Here we focus on how Taliban-ruled Afghanistan, as de facto sovereign gatekeeper, attempts to overcome the lock at Mes Aynak and runs up against the limits of its agency. For the Taliban, Mes Aynak encapsulates the gatekeeper's dilemma. On the one hand, Taliban-ruled Afghanistan urgently needs domestic revenue and symbolic proof of economic competence, and it has repeatedly showcased Mes Aynak as a flagship project that could generate hundreds of millions of dollars annually, thousands of jobs, and a visible sign of foreign confidence in the regime [227]. On the other hand, the Emirate's ideological commitments, governance model, and internal factional dynamics limit how far it can go in meeting external demands on labour standards, transparency, cultural-heritage protection, and community consultation issues central to MCC's risk calculus and to Chinese state concerns about reputational and environmental, social, and governance exposure [402, 403]. Taliban-ruled Afghanistan thus confronts a structural problem: its most attractive revenue opportunity simultaneously demands the very forms of regulatory and political adaptation that are most difficult for the regime to provide without undermining its identity and cohesion.

Interviews with Afghan officials and external experts bring this gatekeeper dilemma into sharp relief. Senior Afghan diplomatic officials A1-A3 portray Mes Aynak as proof that the Emirate can provide security, honour contracts, and deliver economic benefits if external actors are willing to engage; they stress full territorial control, reduced corruption, and readiness to negotiate with all concerned states. External experts, by contrast, describe a paradox in which all meaningful engagement must pass through the Taliban, yet the lack of formal recognition, institutionalized legal guarantees, and predictable regulation makes long-term commitments to projects like Mes Aynak appear more like a gamble than a calculated risk (E1). This divergence underscores that the Taliban's sovereign gatekeeping is real but bounded: territorial control and willingness to bargain do not automatically translate into the credible commitments that major investors require.

Under Taliban rule, Mes Aynak has been reframed as a flagship of Taliban-ruled Afghanistan's resource-driven development strategy and of China's cautious engagement with a sanctioned, unrecognized regime [226, 227, 404]. The post2021 trajectory contains several revealing milestones. In June 2023, the Taliban's Ministry of Mines and Petroleum publicly urged MCC to commence practical work at Mes Aynak, asserting that Afghan obligations under the 2008 contract had been fulfilled and announcing the formation of a joint committee to coordinate with MCC and relevant cultural authorities on the relocation of archaeological artefacts [316, 317]. On 24 July 2024, Taliban officials and Chinese engineers held a highly publicized ceremony in Logar province to mark the start of road construction to the mine site after a sixteen-year delay, with Deputy Prime Minister for Economic Affairs Abdul Ghani Baradar describing the project as "crucial" and calling for the time lost in implementation to be "recuperated with speedy work" [140, 228, 403]. Media coverage stressed that the ceremony took place under heavy security, with Taliban forces pledging to protect Chinese personnel, while analysts and company representatives noted that at least two more years would be required before any copper could be extracted and that the project

would continue to face legal, financial, and archaeological hurdles given U.S. and UN sanctions and the presence of a major Buddhist heritage complex at the site [133, 141, 142].

These episodes suggest that, by mid2024, key technical and cultural bottlenecks such as access roads and artefact management were at least partially incorporated into new governance arrangements, while the primary constraints on full-scale extraction had shifted toward sanctions exposure, reputational risk in Chinese state-owned enterprise portfolios, and the problem of structuring large investments in a jurisdiction without international recognition [141, 142, 226]. Within the geopolitical lock-and-key framework, Mes Aynak thus functions as a test case of whether China and Taliban-ruled Afghanistan can align their respective keys security guarantees, investment protection, and incremental recognition under a still binding U.S-centred financial lock [245, 376, 377].

Externally, Mes Aynak is deeply embedded in the sanctions-based lock and global financial plumbing described earlier. Taliban entities remain designated under U.S. counterterrorism authorities; Afghan foreign reserves abroad are largely frozen or held in trust; and international banks continue to derisk, avoiding Afghan-related transactions even when general licences exist [200, 201, 244]. For Chinese firms and lenders, this environment creates a triple risk: legal and compliance exposure if dollar-linked payments cross the U.S. system; reputational costs of operating under a heavily sanctioned, non-recognized regime with a poor human-rights record; and operational uncertainty about contract enforcement, local opposition, and security [227, 397]. Beijing's emerging practice has been to engage cautiously sending delegations, renegotiating terms, commissioning new studies, and supporting limited preparatory works but to stop short of the large, irreversible capital commitments that a full Mes Aynak build-out would require [140, 227].

Within the geopolitical lock-and-key model, Mes Aynak is therefore a critical case for Corollary 2. Economic logic and bilateral political will are present: Taliban-ruled Afghanistan want revenue and implicit recognition; China wants secure access to copper and broader leverage in Afghanistan and Central Asia [10, 141, 142]. Yet the combination of external constraints (sanctions, banking derisking, global compliance norms) and internal constraints (ideology, institutional weakness, intra-Taliban tension) repeatedly converts high-level agreements into partial, reversible steps rather than sustained implementation. If the gatekeeper could unilaterally unlock its structural environment by offering security and contracts, Mes Aynak would likely be one of the first places we would see this; the fact that the project remains stalled in a state of "managed activation" suggests that gatekeeper agency is sharply bounded by the broader lock.

In indicator terms, Mes Aynak is a concentrated test of G-type variables Gatekeeper Control, Gatekeeper Bargaining, and Gatekeeper Constraints interacting with Chinese keys (K_CN_SEC and investment-protection demands) and U.S./UN sanctions keys (K_US_SANCTIONS). Even where G_Control and G_Bargaining are comparatively strong at the project level, G_Constraints in the form of sanctions and ideological limits prevent Taliban-ruled Afghanistan from converting this leverage into

full project realization, pointing toward managed dissociation rather than unlocking as the most plausible equilibrium.

Structural Constraints on Extraction, Connectivity, Water, Corruption, and Violence. The preceding sub-section established that Mes Aynak's stalled implementation reflects the broader geopolitical lock rather than any single project deficiency. China's own Finance Ministry assessments, as relayed through bilateral diplomatic channels and cited in expert analyses of the project, have identified four structural constraints that Taliban-ruled Afghanistan cannot unilaterally resolve: the absence of road and rail connectivity to the site; acute water scarcity in the Logar basin; systemic corruption across multiple layers of Taliban-ruled Afghanistan administration; and persistent violence, primarily from ISKP, in the surrounding region [10, 141, 142]. These four factors are not independent: they interact and compound each other, raising the total risk profile of the project to a level that justifies Chinese caution even in the absence of Western sanctions. This sub-section examines each constraint in turn, placing the Afghan implications at the centre of the analysis.

Connectivity: no road to mine**.** The most basic physical constraint on Mes Aynak is that there is no paved road connecting the mine site in Logar Province to the national highway network. The Kabul–Kandahar highway passes approximately 25-30 km from the deposit, but the intervening terrain is unmaintained, subject to seasonal closure, and traversable only by light vehicles rather than the heavy ore-transport trucks that large-scale copper extraction would require [23, 405]. Without a purpose-built access road capable of bearing 50-80 tonne loads, copper ore cannot leave the site in commercially viable quantities regardless of what happens underground. Comparative experience from similar remote mines, including Oyu Tolgoi in Mongolia and Tenke Fungurume in the Democratic Republic of Congo, shows that access-road construction for remote large-scale mines typically costs USD 50-200 million and requires two to four years to complete under stable governance conditions [93, 406]. For Mes Aynak, the equivalent figure, factoring in terrain, altitude, and security requirements, has been estimated at upwards of USD 100 million for the primary access road alone, with additional requirements for power transmission lines and water supply infrastructure that do not currently exist at the site [23, 227]. Taliban-ruled Afghanistan has publicized the July 2024 ceremony as marking the "start of road construction," and Taliban officials and Chinese engineers were photographed at the groundbreaking. However, independent reporting and subsequent monitoring indicate that the work initiated was limited preparatory clearing rather than sustained road-build activity, and no operational access road had been completed as of mid-2026 [10, 141, 142]. For Afghanistan, the connectivity deficit is not a technical afterthought: it is the precondition for every other aspect of the project. Until a credible, funded, and secured access-road programme exists, Mes Aynak's extraction timetable is notional rather than operational.

Water resources: a structural mismatch between extraction needs and basin capacity. Copper extraction is water-intensive. Industry benchmarks indicate that open-pit copper mining requires approximately 0.3-0.9 cubic metres of water per tonne of ore processed, and hydrometallurgical processing (the method required for the sulphide ore at Mes Aynak) adds further demand, with total water consumption figures

for comparable deposits typically in the range of 10-30 million cubic metres per year at full production [407, 408]. The Logar River, the principal surface-water source for the region, is a tributary of the Kabul River and is already under severe stress. FAO and World Bank hydrological data place the Kabul River basin among the most water-stressed in Asia, with per-capita water availability in Afghanistan falling below 1,000 cubic metres per person per year, the standard international threshold for "water scarcity", and Logar Province facing additional pressure from population growth and irrigation expansion [351, 407, 409]. Climate projections for the Hindu Kush-Himalayan region compound this picture: reduced glacier melt and increased precipitation variability are expected to further reduce dry-season flows in the Logar and Kabul systems over the coming decades, precisely the period when Mes Aynak would be at full production if construction were to begin soon [89-91]. China's Finance Ministry assessments cited by project analysts have flagged water availability as one of the three primary reasons the MCC consortium has not committed to full-scale extraction, alongside connectivity and corruption [10, 141, 142]. For Afghanistan specifically, this creates a dilemma: the water needed for large-scale copper mining is water that local communities and agriculture also require, and in a country where food insecurity affects most of the population, any project that diverts or degrades water resources will face sustained local opposition regardless of its national revenue benefits. Taliban-ruled Afghanistan has not produced a credible water-management plan or a water-sharing agreement with downstream users as of 2026, meaning this constraint remains unresolved at both technical and governance levels [410].

Corruption: three tiers of extraction above the copper. Corruption at Mes Aynak operates across at least three distinct tiers, each of which increases MCC's cost and risk. At the central level, Taliban leadership in Kabul and Kandahar control project approvals, contract modifications, and royalty structures; reporting and expert interviews indicate that decisions about the mine are concentrated in a small circle with limited technocratic input and significant rent-seeking incentives [10, 141, 142]. At the provincial level, Taliban commanders in Logar exercise de facto control over access to the site, security provision, and local hiring; these commanders have historically demanded side-payments from contractors operating in their zones of influence, a pattern documented under both the pre-2021 republic and the current Emirate [324]. At the local level, sub-contractors, equipment suppliers, and logistics firms face informal levies at checkpoints and border crossings that increase project costs unpredictably and are not reflected in the formal royalty and tax structure agreed with the central government [227, 360]. Transparency International's Afghanistan assessments consistently rank the country among the most corrupt globally, and field researchers note that the Taliban's replacement of the republic has changed the identity of corrupt actors rather than eliminating corruption as a structural feature of the political economy. For MCC, the practical consequence is that the effective cost of operating at Mes Aynak is substantially higher than the formal royalty and tax structure suggests, and the unpredictability of informal payments makes long-term financial modelling unreliable. For Afghanistan, corruption at Mes Aynak means that even if the project were producing copper, a significant share of the revenue would be captured

before reaching the state treasury, undermining the fiscal rationale that Taliban officials use to justify the project to domestic audiences. This is not merely a governance problem; it is a structural constraint embedded in Taliban-ruled Afghanistan's own political economy, and one that the Emirate has limited incentive to resolve fully given that informal revenue extraction benefits connected factions within the leadership.

Violence: ISKP and the fragility of Taliban security guarantees. The fourth structural constraint is the persistent threat of violence, primarily from ISKP, in and around the Logar corridor. ISKP has demonstrated both the intent and the capability to attack economically significant sites and foreign personnel in Afghanistan. UNAMA security reporting documents multiple ISKP-attributed incidents in Logar and adjacent provinces between 2022 and 2025, including roadside bombings, targeted assassinations, and at least one direct attack on infrastructure associated with Chinese-linked operations in eastern Afghanistan [193, 319, 411]. The threat is not merely ambient insecurity but a deliberate strategic choice: ISKP explicitly targets projects that it frames as legitimizing Taliban-ruled Afghanistan or bringing Chinese influence into Afghanistan, meaning that Mes Aynak's high-profile status as a showcase project increases rather than decreases its attractiveness as a target [340, 412, 413]. For MCC and Chinese state-owned enterprise decision-makers, this violence threat has direct implications for project economics: security for a workforce of several thousand workers, protection of heavy equipment and infrastructure, and insurance against attacks on the access road and power supply would add hundreds of millions of dollars to project costs, and a single high-profile attack could force a politically embarrassing suspension of operations [227, 414]. The Taliban's security guarantee to protect Chinese workers, prominently displayed at the July 2024 ceremony, is therefore credible only insofar as Taliban-ruled Afghanistan forces can reliably contain ISKP in Logar, which independent assessments suggest remains uncertain [10, 141, 142]. For Afghanistan, the violence constraint is the one most directly within Taliban-ruled Afghanistan control, yet it is also the one that most exposes the limits of the Taliban's territorial consolidation: controlling provincial governors and customs posts is different from defeating a dispersed, ideologically motivated insurgency with a proven ability to strike symbolic targets. The interaction between the four constraints, no access road makes personnel more vulnerable; water stress fuels local grievances that ISKP exploits; corruption weakens the security apparatus, means that each obstacle reinforces the others, producing a compounded risk profile that cannot be addressed by tackling any single dimension in isolation.

The four constraints as a compounded lock within the lock. Taken together, the connectivity deficit, water scarcity, multi-tier corruption, and ISKP violence constitute a project-level lock within the broader geopolitical lock. Even if sanctions were partially eased and Chinese financing were forthcoming, these four structural constraints would continue to prevent Mes Aynak from reaching full production unless they were addressed systematically and simultaneously. That they have not been addressed reflects both Taliban-ruled Afghanistan's limited institutional capacity and its limited political incentives: resolving the water issue requires negotiating with communities the Taliban governs by coercion; eliminating corruption requires

dismantling revenue streams that benefit connected factions; building the access road requires financing and contractor management beyond current ministry capacity; and defeating ISKP requires a sustained counter-insurgency effort that risks Taliban-ruled Afghanistan manpower and credibility. The model's prediction, that gatekeeper agency is real but bounded, is nowhere more clearly illustrated than in the gap between Taliban-ruled Afghanistan's public commitment to Mes Aynak and its structural inability to resolve the conditions that prevent it from being realized.

The MCC Concession and Investment Impasse

The 2008 MCC deal, a "flagship" promise. Mes Aynak entered the global spotlight in 2007-2008, when a consortium led by MCC and Jiangxi Copper won a competitive tender to develop the deposit [351, 398, 415].The 30-year contract, signed with the pre-Taliban Afghan government, was valued at approximately 3-3.4 billion USD and packaged as a comprehensive development bundle: in addition to copper extraction, MCC pledged to build a power plant, a smelter, and a rail link, and to make substantial upfront payments and royalties on a sliding scale that some observers put at around 19.5 per cent at higher prices [398, 416, 417]. For Afghan officials and many external observers, Mes Aynak quickly became a symbolic flagship of a future in which foreign capital and infrastructure investment would unlock Afghanistan's mineral wealth and anchor the country in regional trade [416-418].

From the outset, however, the contract encoded tension between ambitious promises and weak implementation capacity. The Afghan state lacked robust regulatory institutions for large-scale mining, basic infrastructure such as roads, power, and water was absent at the site, and the contract's bundled commitments were politically attractive but technically demanding [417, 418]. The deal also embedded future bargaining problems: expectations about how quickly mining would start, how security responsibilities would be shared, and how environmental and cultural-heritage issues would be managed were never fully aligned between Kabul and MCC [227, 418, 419]. In the language of the model, Mes Aynak from the beginning combined a high-value resource, an external great-power investor, and a weak sovereign partner an arrangement structurally prone to later disputes.

Stagnation under the republic, security, contract, and heritage disputes. Over the subsequent decade, Mes Aynak became a textbook example of stalled implementation in a fragile state. On the security side, Taliban attacks against the site and its security perimeter, including deadly incidents in 2008 and later years, contributed to MCC's risk perceptions and were frequently cited as reasons for delay [416, 420]. Afghan authorities eventually deployed hundreds of police and established dozens of security posts, and by the mid-2010s they argued that security conditions no longer justified postponement, yet mining still did not begin [416].

At the same time, contractual disputes emerged. MCC backtracked on, or sought to renegotiate, key obligations, including the construction of the promised railway and power plant, and pressed for a reduction in royalty rates from 19.5 per cent to around 9.5 per cent, arguing that the original terms were commercially unrealistic given costs and risks [416]. Afghan officials resisted these demands but lacked strong leverage: they needed investment and feared alienating one of the few major foreign partners

willing to consider such a large project. As a result, the parties oscillated between pressure for implementation and tacit acceptance of delay, without a decisive revision or cancellation [227, 420].

A third, often underestimated, source of stagnation was cultural-heritage and environmental concern. Mes Aynak sits atop an extensive, roughly 1,700-year-old Buddhist city, with temples, statues, and artefacts that Afghan and international archaeologists regard as globally significant [421]. MCC's initial open-pit mining plan implied the near-total destruction of much of this heritage, provoking opposition from archaeologists, civil-society groups, and international organizations [422]. The World Bank's safeguard processes and independent observers flagged serious risks around environmental impacts, resettlement, and heritage preservation, and mitigation efforts salvage archaeology, gradual removal of artefacts created additional delays and costs.

Analytically, these factors show that even before the Taliban's return, Mes Aynak was already shaped by a mix of weak governance, security uncertainty, and global norms around heritage and environment. Importantly, however, none of these constraints were structurally insurmountable: with time, renegotiation, and sustained investment, a recognized Afghan government backed by donors might have gradually moved the project forward [416]. The post2021 transition, as the next subsection shows, recoded these existing issues into a far tighter structural lock through sanctions, nonrecognition, and a new gatekeeper [245, 324, 376].

Post-2021, from target to partner. The Taliban's return to power radically changed the political identity of the gatekeeper but not the basic economic appeal of Mes Aynak. A movement that had once attacked the site now repositioned it as a centrepiece of its economic programmed [140, 227]. Taliban officials, including Deputy Prime Minister Abdul Ghani Baradar and the acting Minister of Mines and Petroleum, repeatedly framed Mes Aynak as a "catalyst" for Afghanistan's economic growth, promising thousands of jobs and hundreds of millions of dollars in annual revenue once extraction begins, often citing figures of 250-300 million USD per year and several hundred million USD in fees over the contract's life [423].

Negotiations with MCC resumed in 2021-2023. Reporting describes virtual and in-person rounds in which the parties revisited the 2008 contract, including timelines, infrastructure obligations, royalties, and mining methods [227, 316, 317]. The Taliban signalled willingness to accept some modifications in exchange for rapid activation, while MCC sought more favourable terms and clarity on security and sanctions exposure [227, 397, 424]. In July 2024, Taliban and Chinese officials held a high-profile ceremony at Mes Aynak, presenting the event as the formal restart of the project and announcing that underground, rather than open-pit, mining would be used in part to mitigate damage to the Buddhist site [228, 424]. Chinese and regional media reported that initial extraction could begin in the mid-2020s, pending technical preparations, financing, and further agreements [227, 420].

Interview evidence strongly supports this sanctions-centred reading. Regional experts describe projects such as TAPI and Mes Aynak as constrained mainly by financing and sanctions, not by narrow security problems, emphasizing that regional states and firms cannot afford to lose millions in high-risk Afghan ventures and that

sanctions force workarounds such as routing funds through third-country accounts (E1, E2). Survey respondents similarly rank economic sanctions and isolation among the primary obstacles to attracting foreign investment for connectivity and mining projects, even when they acknowledge improved physical security under the Taliban (R1, R3, R7, R8). These perceptions align closely with the model's expectation that a U.S-centred financial lock indirectly limits China's willingness to move from symbolic engagement to full-scale investment at Mes Aynak [244, 245, 376].

From Taliban-ruled Afghanistan's standpoint, this marks a strategic rebranding: Mes Aynak transitions from being an example of stalled foreign investment under the republic to a showcase of Taliban "pragmatism" and ability to attract Chinese capital despite Western sanctions [227]. Taliban messaging emphasizes their role as providers of security, protectors of heritage (via underground mining and cooperation with cultural agencies), and guarantors of contractual continuity with a major power [424]. For MCC and Chinese policymakers, however, the restart remains cautious and incremental: as of 2025-2026, full-scale industrial extraction had not begun, and reporting continues to highlight concerns about social and environmental impacts, local displacement, and the lack of independent oversight [227, 397].

What the timeline reveals about gatekeeper agency. Viewed through the geopolitical lock-and-key model, this timeline yields several analytical insights about gatekeeper agency under constraint. First, there is both continuity and change in external leverage. The core external investor remains the same (MCC/China), and its concerns security, contractual risk, ESG exposure are broadly continuous across regimes, but the structural context has shifted: U.S-led sanctions and nonrecognition now make it harder to move money, insure risks, and legitimize operations, reducing the set of feasible financing and governance arrangements [244, 245, 376].

Second, the gatekeeper's need versus capacity has changed. The Taliban's economic need is greater than that of the previous government, and its willingness to trade concessions for activation appears higher for example, acceptance of underground methods, rhetorical commitments on heritage, and flexibility on some contractual terms [227]. However, its capacity to provide what external actors ultimately require predictable regulation, transparent governance, reputational safety, and sanctions-resilient financial channels is sharply limited by internal features (ideology, institutional weakness) and external structures (sanctions, global compliance regimes) [141, 142, 245].

Third, the distinction between symbolic activation and full implementation is evident. The post2021 restart of Mes Aynak has thus far been more symbolic than transformative: ceremonies, announcements, and some preparatory works signal political will but stop short of the irreversible commitment's major capital deployment, large-scale construction, and full production that would fundamentally alter Afghanistan's fiscal and connectivity position [227, 397, 425]. This pattern, visible also in other Taliban-ruled Afghanistan economic initiatives, matches the dissertation's broader expectation of managed dissociation, where partial, sectoral deals emerge but remain vulnerable and limited in scope.

In sum, the Mes Aynak timeline demonstrates that even in a domain where the gatekeeper has substantial leverage control over a high-value resource and a willing major-power partner its agency is bounded by a structural environment it cannot unilaterally unlock. Read through the model, the timeline shows a gradual increase in G_Control (territorial and security control) and G_Bargaining (ability to reopen talks and renegotiate), but only marginal change in G_Constraints, which remain dominated by sanctions, banking derisking, and global ESG expectations [10, 141, 142]. This divergence growing control and bargaining power without a corresponding relaxation of constraints is a core empirical pattern predicted by Corollary 2 and a key building block for the argument about managed dissociation developed later in the chapter.

The Financial Lock on Sanctions and Banking Barriers

Sanctions architecture and banking "de-risking". Mes Aynak sits inside a sanctions-shaped financial landscape that sharply constrains how any large project in Taliban-ruled Afghanistan can be financed [244, 376, 377]. Since 2021, U.S. and UN measures have targeted Taliban leaders and entities, frozen much of Afghanistan's foreign reserves, and left Afghan banks effectively cut off from normal correspondent relationships and dollar-clearing channels [89-91]. Even where sanctions regimes formally permit some commercial and humanitarian activity through general licences, international banks have engaged in systematic "de-risking": they avoid Afghan exposure rather than navigate complex compliance requirements and ambiguous enforcement risks [244, 245, 376].

This overcompliance is not an incidental side-effect but an integral part of how sanctions work in practice. Studies of Afghanistan's financial access since 2021 document banks closing Afghan accounts, blocking payments that reference Afghanistan, and requiring extraordinarily high internal compliance resources for even small, licensed transactions one European bank reportedly needed 40-50 staff members to clear a single transfer [244]. For a capital-intensive project like Mes Aynak, which requires large cross-border payments, insurance, and long-term financing, this environment transforms every financial step loan disbursement, equipment imports, dividend repatriation into a potential compliance hazard [89, 90, 91]. In terms of the model, sanctions and derisking function as structural lock mechanisms that operate through global financial plumbing rather than overt vetoes.

The Taliban's own decisions have deepened these concerns. Analyses note that Taliban-ruled Afghanistan's rollback of transparency and AML/CFT safeguards, including weakening the central bank's financial-intelligence functions, has further undermined confidence in Afghanistan's banking system and increased perceived money-laundering and terror-finance risks [245, 376, 377]. This gives compliance departments and regulators additional reasons to treat Afghan-related transactions as presumptively high-risk, reinforcing the lock even where political actors might prefer some economic engagement [244].

Chinese firms under sanctions and ESG scrutiny. Chinese state-owned enterprises are not directly bound by U.S. foreign policy, but they are deeply entangled with Western-dominated financial and reputational circuits [340, 426]. For MCC and related

entities, participation in Mes Aynak must be evaluated against at least three kinds of risk.

First, there is legal and financial risk. Even if MCC and its financiers structure transactions in renminbi or through non-Western banks, many global suppliers, insurers, and shipping firms involved in equipment procurement and logistics still rely on dollar clearing or maintain exposure to U.S. and EU jurisdictions [245, 340, 376]. Any misstep that appears to route funds through sanctioned entities, or to provide material support to designated Taliban actors, could trigger secondary sanctions or enforcement actions with broader consequences for Chinese firms' global operations [427]. This legal uncertainty makes it rational for Chinese enterprises to delay large, irreversible investments in Afghanistan until there is clearer guidance or some loosening of the sanctions environment [226, 397].

Second, there is reputational and ESG risk. Mes Aynak has been controversial for years due to the Buddhist heritage site, environmental concerns, and displacement of local communities, and these concerns have sharpened under Taliban rule [227]. International NGOs and media have highlighted issues such as inadequate compensation, resettlement risks, and potential damage to the archaeological complex; under Taliban-ruled Afghanistan, independent monitoring has become more difficult, with foreign researchers and journalists facing tighter access constraints [227, 324]. For a state-owned firm tied to China's global image, a high-profile project in a sanctioned country, under a regime criticized for human-rights violations and over a Buddhist site, threatens to reinforce negative narratives about "extractive" BRI practices and disregard for local communities [426, 428]. This reputational calculus helps explain Beijing's incremental approach symbolic restarts and limited works rather than full-scale deployment.

Third, there is security risk. While the Taliban have improved local security compared to pre-2021 conditions, ISKP attacks, cross-border militancy, and incidents targeting Chinese workers in Afghanistan illustrate the fragility of Taliban security guarantees [340, 412, 413]. Analysts note that Chinese nationals have been attacked near northern resource sites and around Kabul, underscoring the risk that Mes Aynak personnel and assets could become high-value targets [324, 340, 412]. In Kabul and Logar, ISKP retains the capability to strike symbolic economic sites, meaning any major escalation of investment at Mes Aynak must factor in not only protection costs but also the possibility that a serious attack could force a sudden, politically embarrassing withdrawal.

These three dimensions legal/financial, reputational/ESG, and security combine to produce what one recent analysis calls China's "great waiting game" in Afghanistan: Beijing keeps options open and cultivates the Taliban through promises and small deals but postpones decisive commitments until the risk-reward balance improves [134, 359, 361]. In the framework used here, this is a form of strategic hedging within the lock: China leverages the prospect of Mes Aynak to gain influence and security cooperation, but the structural lock prevents it from turning that leverage into full project realization.

Mes Aynak as a financial test of gatekeeper power. For the Taliban, Mes Aynak is a test of whether gatekeeper control can overcome sanctions-based structural

constraints. Taliban-ruled Afghanistan's strategy has been to offer security guarantees, regulatory flexibility, and visible political support to reassure MCC and Beijing, while using the project as proof to domestic and regional audiences that Afghanistan is "open for business" despite Western isolation [429]. Yet the financing picture shows that control over territory is not enough: without access to trusted banking channels, credible compliance mechanisms, and some degree of international legitimacy, even a willing great-power partner cannot easily move billions of dollars through the global system into a sanctioned, non-recognized jurisdiction [244, 376, 377].

From an analytical standpoint, this demonstrates that gatekeeping agency is mediated by financial infrastructure. Taliban-ruled Afghanistan can sign contracts, provide on-the-ground security, and adjust domestic regulations, but it cannot by itself change OFAC guidance, reverse global bank de-risking trends, or create reputational safe havens for foreign firms [200, 201, 244]. As a result, Mes Aynak advances through a sequence of partial moves renegotiated terms, high-profile ceremonies, exploratory works rather than the sustained capital flows and construction activity that would fully activate the mine [227, 420].

This pattern aligns closely with Corollary 2 of the model. Even where the gatekeeper and a major external actor share strong economic incentives to proceed, the interaction of sanctions, financial plumbing, and risk calculus constrains their room for manoeuvre: the gatekeeper can bargain within the lock but cannot unlock it [10, 141, 142]. In indicator terms, this section documents a dense cluster of L_3 (blocking statecraft) actions sanctions design, OFAC guidance, global derisking interacting with K_US_SANCTIONS (stringent compliance expectations) and K_CN_SEC/INV (Chinese security and investment-protection keys). These moves constrain G_Bargaining even when Taliban-ruled Afghanistan and MCC reach high-level understandings, translating systemic rivalry and financial governance into project-level hesitation and reinforcing the broader pattern of managed dissociation [133, 244, 430].

Taliban-ruled Afghanistan's Bargaining Strategy and Its Limits

Revenue, recognition, and narrative. Taliban-ruled Afghanistan's bargaining strategy at Mes Aynak revolves around three intertwined objectives: revenue generation, incremental recognition, and narrative control. Taliban leaders describe Mes Aynak as a cornerstone of their plan for economic self-reliance, repeatedly citing expected annual revenues of hundreds of millions of dollars and thousands of jobs as evidence that the Emirate can govern effectively without Western aid [227, 431, 432]. Official statements frame the project as a catalyst for national development, emphasizing its role in financing basic services, salaries, and infrastructure, and contrasting this with the perceived failure of the previous republic to realize the mine's potential [140, 431].

Second, Mes Aynak functions as a diplomatic bargaining chip for Taliban-ruled Afghanistan. By engaging with China on such a high-profile project, Taliban officials signal to other regional actors and implicitly to Western capitals that isolation is porous and that Afghanistan can attract major investment despite nonrecognition [216, 217, 227]. Participation of Chinese delegations at ceremonies in Logar, and coverage in Chinese and regional media, allow the Taliban to present themselves as pragmatic

partners rather than pariahs, hoping to strengthen their case for de facto, and eventually de jure, recognition [140, 226, 412]. In this sense, Mes Aynak is not only a mining project; it is part of a broader attempt to rebrand the gatekeeper in the eyes of external audiences.

Third, Taliban-ruled Afghanistan uses Mes Aynak to craft a domestic narrative of modern Islamic governance. Taliban outlets emphasize that the Emirate can simultaneously uphold Islamic values, protect cultural heritage by endorsing underground mining to preserve Buddhist remains and manage complex economic ventures with foreign partners [133]. This narrative is important internally because it responds to criticism from rival Islamist groups and sceptical constituencies that the movement is either too rigid to deliver development or too willing to compromise on religious and national principles. Mes Aynak becomes a demonstration project for the idea that the Emirate can deliver "halal" development while maintaining ideological integrity [133, 302].

Ideological and institutional constraints on concessions. These ambitions, however, are constrained by ideological commitments and institutional weaknesses inside Taliban-ruled Afghanistan. Ideologically, powerful factions within the Taliban prioritize strict implementation of their interpretation of Islamic law and centralization of authority in religious leadership circles, which makes them wary of arrangements that appear to cede control over land, labour, or regulation to foreign companies [141, 142, 433]. Demands from MCC and Beijing for clear legal guarantees, dispute-resolution mechanisms, and predictable regulatory environments can be interpreted by hard-liners as infringements on sovereignty or as steps toward "Western-style" corporate governance, limiting how far negotiators can go in offering binding arbitration clauses, independent oversight, or transparency measures without facing internal pushback [10, 141, 142].

Institutionally, Taliban-ruled Afghanistan lacks a mature technocratic apparatus for regulating a project as complex as Mes Aynak. Ministries involved in mining, environment, and finance are staffed by a mix of former officials, Taliban cadres with limited sectoral experience, and returning technocrats whose authority is often precarious [141, 142, 434]. Coordination across ministries is weak, and ultimate decision-making authority rests with a small circle of senior leaders in Kandahar, whose priorities may not align with the detailed needs of project implementation [245, 324, 376]. This institutional structure makes it difficult to sustain consistent negotiating positions, monitor social and environmental commitments, or respond quickly to emerging problems, which in turn reduces the credibility of Taliban-ruled Afghanistan's offers in Chinese risk assessments [217, 435].

These internal features produce a negotiating posture that oscillates between flexibility and rigidity. On issues that can be framed as technical or secondary such as accepting underground mining methods, or allowing archaeologists limited time to salvage artefacts Taliban-ruled Afghanistan has shown willingness to adapt [133, 436]. On issues that touch core ideological or sovereignty concerns such as independent monitoring, open publication of contracts, or accepting external arbitration the Emirate has been far more resistant [10, 141, 142]. Consequently, Taliban-ruled Afghanistan

can offer enough concessions to keep China engaged, but not enough to fully satisfy the risk thresholds of Chinese firms and financiers in a sanctions-heavy environment [227, 246, 361].

Local politics, heritage, and coercive bargaining. At the local level, Taliban-ruled Afghanistan also uses coercive and hierarchical tactics to manage communities and heritage issues around Mes Aynak, which shapes bargaining with both internal and external actors. Reports indicate that residents of villages slated for relocation have faced pressure to accept compensation packages and move, with limited avenues to contest terms or seek independent legal redress [227, 437]. Some communities have complained about inadequate housing, water, and livelihoods in resettlement areas, echoing grievances that emerged under the previous government but now with fewer channels for civil-society advocacy [324, 437]. This approach may reduce short-term friction for Taliban-ruled Afghanistan but increases long-term risk of local resentment, sabotage, or reputational damage for MCC [435].

Heritage management is similarly top-down. The Taliban's pledge to protect the Buddhist city by mining underground is a strategic concession to UNESCO norms and external sensitivities, but it is implemented in a context where independent archaeologists and media face significant restrictions [133, 302, 438]. While Taliban-ruled Afghanistan has allowed the transfer of some artefacts to the National Museum and has publicized these moves as evidence of respect for Afghan history, the overall process remains opaque and subject to political decisions rather than clear legal frameworks [436]. For Chinese partners, this combination of formal concessions and informal practices makes it difficult to assess future reputational risk, again reinforcing cautious engagement [246, 361].

Bargaining outcomes, partial opening, not full unlocking. The net effect of these bargaining dynamics is an outcome of partial opening without full unlocking. Taliban-ruled Afghanistan has succeeded in moving Mes Aynak from total stagnation toward limited reactivation: it has engaged MCC, renegotiated aspects of the contract, organized high-profile ceremonies, and facilitated some preparatory works on the ground [227, 435]. These steps generate political benefits domestically and in relations with China, and modest economic gains through small-scale activity and ancillary rents. This juxtaposition visible G_Bargaining in the form of renegotiations, ceremonies, and symbolic activation, but persistently high G_Constraints due to sanctions, reputational risk, and internal ideological limits captures the core mechanism of gatekeeper's constrained agency posited in Corollary 2.

Yet the core features of the structural lock remain intact. Sanctions and banking derisking continue to complicate large-scale financing; reputational and security risks still deter decisive Chinese capital deployment; and internal ideological and institutional constraints prevent Taliban-ruled Afghanistan from offering the full suite of assurances that MCC and Beijing would require for a multidecade, multibillion-dollar mining operation [244, 439, 440]. Mes Aynak therefore advances in a pattern like that observed in UAP: announcements, memoranda of understanding, and partial measures accumulate, but they do not crystallize into sustained, transformative implementation [217, 246].

In terms of Corollary 2, this confirms that the sovereign gatekeeper can bargain but not break the lock. The pattern of events at Mes Aynak incremental G_Control, visible G_Bargaining through renegotiations and symbolic activation, but persistently high G_Constraints due to sanctions, banking derisking, ESG concerns, and internal ideological limits matches the diagnostic expectations laid out for G_type indicators in Chapter 1. Taliban-ruled Afghanistan uses Mes Aynak to seek revenue, recognition, and narrative advantage, and it manages to pry open some narrow channels of engagement with China. However, the interaction of external constraints (sanctions, financial plumbing, global norms) and internal constraints (ideology, weak institutions, coercive local governance) ensure that the project remains a case of managed dissociation rather than full integration into regional and global production networks [244, 324]. The next section widens the lens to show how this pattern at Mes Aynak resonates with other sectoral initiatives such as transit arrangements and unilateral projects like Qosh Tepa, reinforcing the argument that the most likely equilibrium for Afghanistan is a patchwork of partial deals under a persistent geopolitical lock.

Weighing alternative explanations at Mes Aynak

The Mes Aynak record contains three prominent alternative explanations for delay that predate and accompany the geopolitical lock: archaeological and heritage constraints at the Buddhist site; the commercial recalculations of MCC, including its renegotiation of royalty terms and its retreat from the power-plant, smelter, and railway commitments; and technical constraints of energy supply and transport. Each has demonstrably contributed to the project's trajectory, and the analysis above has documented them in detail rather than assuming them away.

Their explanatory weight, however, is bounded by the post-2021 evidence. The heritage question has been substantially narrowed by Taliban-ruled Afghanistan's acceptance of underground mining and the phased relocation of artefacts; the commercial terms have been the subject of renewed negotiation with a gatekeeper eager to concede; and site security has improved to the point that preparatory works have proceeded under Taliban-ruled Afghanistan protection. What has not changed is the sanctions and banking environment, and it is at precisely this unchanged point that the project continues to stall: no financing agreement, no construction contract, no extraction. When the constraints specific to the alternative explanations ease while the outcome persists, and the constraint that persists is the one the model identifies, the inference is that archaeology, commerce, and technical factors are real but subordinate, interacting with a financial-legal lock that remains the binding constraint on implementation.

How Mes Aynak Confirms Corollary 2 and Managed Dissociation

Mes Aynak as a template of partial activation. The Mes Aynak case illustrates a pattern this dissertation terms managed dissociation: selective, bilateral engagement that generates limited connectivity or extraction without integrating Afghanistan into broader regional networks [227]. At Mes Aynak, Taliban-ruled Afghanistan has converted territorial control into symbolic activation contract renegotiations, ceremonies, and modest preparatory works but has not overcome sanctions, financial de-risking, ESG concerns, and security risks sufficiently to trigger full-scale mining [9,

135, 136]. The gatekeeper can therefore open a narrow channel to one major partner (China), but this channel remains shallow and vulnerable, with little spillover into wider trade, infrastructure, or financial normalization [227, 441].

This pattern matches Corollary 3's expectation that, under a persistent geopolitical lock, the most likely equilibrium is not complete isolation or full unlocking, but fragmented bilateralism. Mes Aynak delivers some revenue prospects and political gains for Taliban-ruled Afghanistan and some strategic options for China, yet it leaves Afghanistan's overall connectivity and development profile largely unchanged: the country remains excluded from most multilateral financing, integrated mineral supply chains, and diversified export routes, even as it becomes incrementally tied to a small number of politically conditioned projects [244, 376, 377]. From the standpoint of Corollary 2, Mes Aynak shows that even in a domain where the gatekeeper has unusually high G_Control and significant G_Bargaining leverage control over a world-class deposit and a willing great-power investor G_Constraints remain decisive in shaping outcomes [139, 353]. The case therefore demonstrates that gatekeeper agency can modulate, but not overturn, the structural lock, reinforcing a shift from expectations of unlocking to the reality of managed dissociation.

The primary data substantiates this reading. Afghan officials emphasize that Mes Aynak is central to their economic strategy and insist that remaining obstacles are mainly external sanctions, frozen assets, and Western political resistance (A1-A3). Expert interviewees and survey respondents, however, consistently highlight that sanctions, reputational risk, and governance concerns make Mes Aynak a highly constrained bet even for China, reinforcing the conclusion that the Taliban's agency at the site is structurally bounded rather than fully transformative (E1-E3; R1-R14).

Other sectoral initiatives, transit and water. Similar dynamics are visible in other sectoral initiatives. On rail and transit, Uzbekistan has extended its contract to operate the Hairatan-Mazar-e-Sharif line through 2026 and continues to move goods through northern Afghanistan, while also agreeing to repairs and upgrades and commissioning feasibility work on broader cross-country rail links, including the proposed Trans-Afghan/UAP Railway [316, 317, 442]. These arrangements show that Taliban-ruled Afghanistan can negotiate working deals on existing infrastructure and future projects, and that some neighbours are willing to treat the Emirate as a de facto partner for specific purposes. Yet the scope of these deals is tightly circumscribed: they focus on short segments, operations, and feasibility, not on large-scale construction or full corridor integration, precisely because sanctions, non-recognition, and security concerns make long-term commitments risky [67, 246, 329].

The Qosh Tepa Canal provides a different but analytically essential complement to Mes Aynak and UAP. Launched in early 2022, formally inaugurated in phases through 2023-2025, and framed as a national economic priority by Taliban leadership, the canal is a large-scale unilateral irrigation project designed to divert up to 6–10 cubic kilometres of water annually from the Amu Darya River to irrigate approximately 550,000 hectares of arid northern Afghan territory in Faryab and Jowzjan provinces [134, 345, 443]. It is the largest infrastructure project Taliban-ruled Afghanistan has independently financed and constructed, drawing on a combination of domestic tax

revenues, transit fees, and informal extraction. For Taliban-ruled Afghanistan, Qosh Tepa is simultaneously an economic tool and a sovereignty signal: a showcase of the Emirate's capacity to govern, mobilize labour, and deliver infrastructure without foreign capital or international recognition, and a mechanism to reduce food insecurity, generate employment, and provide an agricultural alternative to opium cultivation in northern provinces [134, 444]. Survey respondents from Afghanistan consistently identified water sovereignty and Qosh Tepa specifically as evidence that Taliban-ruled Afghanistan can manage large projects when external financial gatekeepers are removed from the equation (R2, R4, R5, R9, R10). Within the geopolitical lock-and-key model, Qosh Tepa is the clearest empirical illustration of the managed dissociation dynamic at its most unilateral: when external corridors are blocked, the sovereign gatekeeper turns inward and pursues projects that strengthen domestic legitimacy and resource control without requiring the alignment of external keys. However, the canal has generated serious regional concern in downstream Uzbekistan, Turkmenistan, and Kazakhstan about water security, reduced flows into the Aral Sea basin, and the absence of any formal water-sharing agreement or multilateral environmental assessment [345]. Uzbekistan's government has raised the issue in bilateral channels and in SCO forums, with the prospect of water-related tension adding a new dimension to the already complex Central Asian-Afghan relationship. Analytically, this downstream externality matters for the dissertation's argument: it demonstrates that managed dissociation is not a costless or stable equilibrium. Unilateral Taliban-ruled Afghanistan projects that deliver domestic gains without multilateral coordination can harden the structural lock rather than ease it, by creating new sources of regional grievance that further complicate the Central Asian states' willingness to back UAP and corridor diplomacy unconditionally. Qosh Tepa thus reinforces a central prediction of the model: in a geopolitically locked environment, actors facing structural constraints do not passively wait for the lock to open but instead reshape their immediate geography in ways that can simultaneously serve short-term regime interests and generate longer-term connectivity complications. The canal exemplifies how the sovereign gatekeeper operationalizes its bounded agency, not by unlocking the system but by selectively navigating around it, often at regional cost. Yet it has generated serious concerns in downstream Central Asian states about water security, environmental damage, and the Aral Sea, with no formal water-sharing agreements or regional governance mechanisms in place [316, 317, 443]. In the lock-and-key framework, Qosh Tepa exemplifies how a constrained gatekeeper turns inward when external channels are blocked: it pursues unilateral projects that may stabilize the regime domestically but further complicate regional relations, potentially hardening the structural lock rather than easing it [134].

Taken together, Mes Aynak, limited transit deals, and Qosh Tepa depict a coherent equilibrium. The Taliban regime secures piecemeal, often bilateral gains: modest transit revenues, selective Chinese engagement in mining, and domestic agricultural and symbolic benefits from Qosh Tepa [227, 442]. Yet none of these initiatives align the incompatible keys of systemic and regional actors or generate integrated, multi-actor corridors. Instead, each project either remains narrow and reversible (Mes Aynak,

Hairatan-Mazar) or reinforces perceptions of Afghanistan as a source of risk (Qosh Tepa), thereby justifying continued caution, sanctions, and alternative corridor promotion by neighbours and great powers [67, 246, 329].

Sanctions, financial plumbing, and risk perceptions, evidence from interviews and survey. Elite interviews and the expert survey underscore how sanctions, non-recognition, and financial-plumbing problems shape the prospects of Mes Aynak more than narrow technical considerations. One regional politics expert characterized Afghanistan as a "bridge between South and Central Asia" that could, under the right management, become a transit centre with multiple trade routes, yet insisted that this remains "a theoretical possibility rather than a possible option" because the country is governed by a de facto authority that is not recognized and is subject to sanctions and financial isolation (Interview E1- regional politics expert, 2025). In their view, Taliban-era integration prospects have "drastically changed into the negative side because of sanctions, lack of recognition from strong players on the world arena and the lack of international financial system," making "large-scale projects simply not feasible."

Another interviewee with expertise in regional security and energy described projects such as TAPI and Mes Aynak as being constrained "mainly by financing and sanctions, not by security," noting that Central Asian states "cannot afford to lose millions in high-risk Afghan projects" and that sanctions complicate financial transfers, forcing workarounds such as routing funds through third-country accounts (Interview E2 - regional security and connectivity expert, 2025). This assessment closely mirrors the mechanisms identified in the geopolitical lock-and-key model, where U.S.-led sanctions and non-recognition function as keys that indirectly limit China's willingness to move from memoranda to full-scale investment at Mes Aynak [244, 376, 377].

Survey responses from regional academics and practitioners reinforce this picture. Among the respondents who completed the closed-ended battery, eight of nine agreed or strongly agreed (five strongly) that economic sanctions and isolation have hindered Afghanistan's ability to attract foreign investment for connectivity projects (item 18; the full distribution is reported in Table A.5), while open-ended answers consistently list sanctions, trust deficits, and the illegitimacy or non-recognition of the current government among the biggest challenges to Afghanistan becoming a regional connectivity hub (Survey respondents R1-R14). Several stress that, even where China or other actors see economic potential, political risk and exposure to secondary sanctions make long-term commitments at sites like Mes Aynak appear more like a gamble than a calculated risk [227, 324, 445]. Together, these perceptions suggest that the de facto Afghan Chinese economic relationship is tightly bounded by the external financial lock described in Corollary 2, rather than by a lack of geological potential or demand for copper.

The Limits of Gatekeeper Agency at Mes Aynak

The paired analysis of the UAP Railway and Mes Aynak shows that Afghanistan's post-2021 connectivity impasse is best understood as the outcome of a multi-level geopolitical lock rather than isolated project failures. UAP demonstrates that when a corridor promises to significantly reshape regional trade patterns and strategic balances, great-power and regional rivalry harden, producing systemic deadlock even

where clear economic gains exist, confirming Corollary 1 (Great Power Deadlock). Mes Aynak shows that even where rivalry is less overt and a powerful external actor shares strong economic incentives with the Taliban, sanctions, financial plumbing, reputational constraints, and internal ideological limits sharply bound what the gatekeeper can achieve, confirming Corollary 2 (Gatekeeper's Constrained Agency).

Together, the two cases converge on the equilibrium anticipated in Corollary 3 (Managed Dissociation). In UAP, systemic and regional actors prevent the emergence of an integrated North-South rail corridor, while allowing narrow, reversible cooperation on feasibility studies and short segments [136-138]. In Mes Aynak, China and Taliban-ruled Afghanistan move from complete stagnation to partial activation renegotiated terms, ceremonial restarts, limited preparatory work but full-scale mining remains blocked by sanctions, banking de-risking, ESG concerns, and Taliban governance constraints [227]. Beyond these cases, sectoral initiatives such as the Hairatan-Mazar railway operation and the unilateral Qosh Tepa Canal reinforce the pattern: Afghanistan engages in selective, often bilateral projects that deliver bounded gains while leaving the broader configuration of corridors, finance, and recognition essentially unchanged [134, 442].

Mes Aynak underscores the limits of gatekeeper agency. Taliban-ruled Afghanistan controls the territory, commands the security apparatus at the site, and faces strong fiscal incentives to make the project work; it has also strategically used Mes Aynak to seek revenue, incremental recognition, and a narrative of "pragmatic" Islamic governance [227]. Yet it cannot unilaterally alter the sanctions architecture that shapes global banking, compel Chinese firms to absorb ESG and security risks beyond their tolerance, or easily reconfigure its own ideological and institutional structures to meet external expectations on transparency, heritage, and community rights [244, 441]. As a result, the Emirate can secure transactional openings at the margin opening narrow channels to China or to specific neighbours, but it cannot unlock the structural constraints that also immobilize UAP and other high-stakes projects [10, 141, 142].

For the dissertation's overall argument, this synthesis reinforces three implications. First, it validates the geopolitical lock-and-key model as a useful mid-range framework: UAP and Mes Aynak together display the predicted interaction of structural locks, incompatible keys, and bounded gatekeeper agency. Second, it shows that liberal-functionalist expectations that shared economic interests and technical feasibility will gradually overcome political barriers are systematically violated in Afghanistan's case: the more economically rational and strategically central a project is, the more it attracts blocking behaviour. Third, it points toward a future in which Afghanistan remains embedded in a patchwork of partial deals and unilateral projects, rather than integrated corridors a condition of managed dissociation that is politically sustained rather than merely accidental [134, 324].

The general conclusion will build on this empirical foundation to: restate how UAP and Mes Aynak answer the core research question about Afghanistan's unrealized connectivity potential; refine the theoretical contributions on sovereign gatekeepers and managed dissociation; and assess the realistic range of future scenarios from

continued deadlock to limited reconfiguration of the lock in light of evolving regional politics and global sanctions regimes.

Beyond documentary evidence, the dissertation's findings are reinforced by elite interviews and an expert survey. Afghan officials consistently portray 2021 as a turning point that delivered full territorial control, improved security, and new opportunities for engagement with Central Asian states, China, Iran, and Russia, yet they also acknowledge that sanctions and non-recognition restrict large-scale financing and formal agreements (A1-A3). External experts and survey respondents, by contrast, repeatedly identify sanctions, financial isolation, and the absence of international recognition rather than technical feasibility as primary obstacles to projects such as the UAP Railway and Mes Aynak, thereby empirically substantiating the geopolitical lock-and-key model's emphasis on external structural constraints.

At the same time, interviewees validate the notion of the Taliban as a sovereign gatekeeper whose agency is real but bounded. Afghan officials emphasize their readiness to negotiate and provide security guarantees, while external experts describe a paradoxical situation in which all meaningful engagement must pass through the Taliban, yet investors lack institutional and legal guarantees and remain wary of long-term commitments [227]. Survey responses further suggest that, over the next decade, experts expect at best limited, project-specific arrangements such as isolated mining or energy deals rather than integrated trans-Afghan corridors, lending additional support to the conclusion that managed dissociation, rather than full unlocking or complete isolation, is the most plausible equilibrium under current conditions.

Interviews with Afghan officials confirm that the Islamic Emirate sees itself as a sovereign gatekeeper capable of providing security and enabling investment at sites like Mes Aynak. Senior foreign-ministry officials emphasized that, since 2021, "the current government has complete control and sovereignty throughout the country," that "security has been established throughout the country," and that the corruption and fragmentation of the previous era have been reduced (Interview A1 - senior Afghan diplomatic official, 2025). They underline that Afghanistan is "ready to negotiate" with any state that has concerns and highlight growing interest from Central Asian countries, China, Iran, and Russia in investing in railways, transit, and mining. From this vantage point, the central obstacle to activating Mes Aynak lies not in local security provision but in external reluctance to recognize and engage with the regime.

External experts, however, portray the Taliban's gatekeeper position as a paradox. One interviewee argued that the movement is "in control of the territory, but not recognized by the world community," so "any interaction between Afghanistan and interested parties requires engagement with them," yet the lack of institutional and legal guarantees makes long-term commitments at Mes Aynak and similar sites appear highly risky (Interview E1 - regional politics expert, 2025). In their words, relations with the Taliban are "majorly trust-based," with partners relying on "hope and a handshake," whereas even the previous republican government, despite its flaws, offered "some constitutional framework and some human rights as well as access to the financial network" that investors could rely on. This reinforces the model's emphasis on bounded gatekeeper agency: the Taliban's territorial control does not

automatically translate into credible commitments vis-à-vis external investors [10, 141, 142].

Expert survey respondents converge on this assessment. While they overwhelmingly "strongly agree" that Afghanistan's natural resources could significantly enhance economic connectivity and see projects like Mes Aynak as potentially transformative, they also identify weak governance, lack of recognition, and political instability as major barriers. Open-ended answers warn that, without more predictable rules and some form of international accommodation, Afghanistan's strategic location and resource wealth will not be sufficient to unlock integrated corridors; instead, actors will continue to prefer cautious, fragmented engagements, if any, rather than large, corridor-linked mining investments [244, 324]. This pattern is consistent with the dissertation's claim that the Taliban can open specific doors as a sovereign gatekeeper but cannot, on their own, unlock the broader structural constraints that keep Mes Aynak stalled.

Taken together, the stalled status of Mes Aynak and the pattern of partial, reversible moves suggest that a full unlocking of Afghanistan's connectivity is unlikely in the short term. As argued in Chapter 2, these patterns are consistent with a broader outcome of managed dissociation, in which connectivity around Afghanistan is deliberately segmented and calibrated rather than fully integrated [134, 246]. The Conclusion chapter draws these findings together with the UAP case to evaluate whether Afghanistan's post-2021 connectivity equilibrium is best characterized as managed dissociation rather than unlocking or complete isolation.

3.4 Comparative Snapshot of Additional Corridors

The UAP Railway and Mes Aynak are the dissertation's principal case studies, but they do not exhaust Afghanistan's connectivity landscape. Seven additional corridors and projects, the Lapis Lazuli Route, CASA-1000, the BRI in Afghanistan, the INSTC and Chabahar, TAPI, Gwadar, and the trans-Afghan rail standards problem, are included not as full case studies but as comparative snapshots that test whether the pattern observed in UAP and Mes Aynak holds across different sectors, actor configurations, and time horizons. Each vignette follows the same analytical logic: what was planned (MOU content and design intent), what has happened (current implementation status), what specific problem the project reveals (the distinct mechanism of the lock at work), and what the implication is for Afghanistan specifically. Expert survey respondents from Afghanistan (R2, R5, R6, R9) and Pakistan (R3) were asked in open-ended responses to identify which projects they considered most important for Afghanistan's economic future: UAP, TAPI, and Mes Aynak received the most mentions, followed by Lapis Lazuli and CASA-1000, while Gwadar was most frequently cited by Pakistani respondents as the critical terminal architecture. This ordering corresponds to the sequencing below, which proceeds from the corridor projects most central to the dissertation's UAP analysis to the technical standards problem that underlies all of them. Together they reinforce the dissertation's argument that the pattern of stalled or fragmented connectivity is not project-specific but structural. The observations from these snapshots are integrated into the cross-case

synthesis in Section 3.5 and into the evaluation of the model against alternative explanations in Chapter 4; they function as shadow cases extending the external validity of the two core case studies rather than as additional full cases.

Lapis Lazuli Corridor

The Lapis Lazuli Route is a multimodal transport corridor linking Afghanistan to Turkey via Turkmenistan, Azerbaijan, and Georgia, formalized in a framework agreement signed by the five transit states in Ashgabat in November 2017 [106, 364, 446]. The corridor was conceived as a western complement to the UAP Railway's North-South axis, providing Afghanistan with an overland outlet to European and Middle Eastern markets that bypasses both Pakistan and Iran. At its formal launch, participating governments estimated that the route could carry 3-5 million tonnes of freight annually once fully operational, with benefits for Afghan dried fruit, gemstone, and light-industrial exports to Turkish and European buyers [447].

In practice, the Lapis Lazuli Corridor has seen minimal sustained cargo flows. The August 2021 Taliban takeover severed the route's Afghan segment from the formal agreement framework: Taliban-ruled Afghanistan is not a recognized party to the original MOU, and the transit states have not renegotiated the agreement with the Emirate [364]. Uzbekistan's Hairatan rail link and Turkmenistan's road connections to Afghan border points remain physically intact, but customs procedures, documentation requirements, and financing mechanisms have not been updated to account for the post-2021 governance change. Independent shipping firms operating on the corridor report persistent documentation delays at Afghan border crossings, unpredictable duty application, and difficulty securing insurance for cargo transiting Taliban-controlled territory [105, 129]. For Afghanistan specifically, the Lapis Lazuli Corridor's dormancy means that the country's western export potential, dried fruit, saffron, carpets, is channelled through informal traders and grey-market routes rather than through a formal, lower-cost corridor that would generate measurable customs revenue and reduce transaction costs for Afghan exporters. Reviving the corridor would require at minimum a working-level transit agreement between Taliban-ruled Afghanistan and the four transit states, a customs harmonization protocol, and an insurance arrangement acceptable to international freight forwarders, all of which are contingent on the broader recognition and sanctions environment.

CASA-1000 (Central Asia-South Asia Electricity Transmission)

CASA-1000 is a high-voltage direct-current electricity transmission project linking Kyrgyzstan and Tajikistan to Afghanistan and Pakistan. The project is financed through a World Bank-led consortium with contributions from the Islamic Development Bank, the US Agency for International Development, and other donors, with total project cost of approximately USD 1.2 billion [92, 351]. The project was designed to monetize Central Asian summer hydroelectricity surpluses by transmitting power southward to electricity-deficit Afghanistan and Pakistan, with Afghanistan receiving approximately 300 MW of transit power and Pakistan receiving 1,000 MW at full capacity.

CASA-1000's post-2021 trajectory illustrates the ring-fencing mechanism described in this dissertation as characteristic of managed dissociation. Following the

Taliban takeover, the World Bank and donor governments redesigned the Afghan segment's financial architecture to exclude Taliban-ruled Afghanistan from fiscal control: payments for Afghan transit services are channelled through a ring-fenced escrow mechanism rather than directly to Taliban-controlled budget accounts, and the Afghan segment's construction contractor management was restructured to minimize direct Taliban-ruled Afghanistan contractual authority [89, 92, 448]. As of December 2025, approximately 23 per cent of the project's 310 transmission towers on Afghan territory had been installed, with the Afghan segment accounting for most of the remaining construction risk. The ring-fencing arrangement has allowed construction to resume after a 2021-2023 pause, demonstrating that technically scoped, institutionally ring-fenced connectivity can proceed under Taliban rule, but it also demonstrates the ceiling of this approach: Taliban-ruled Afghanistan receives limited revenue, retains minimal institutional ownership, and has no incentive to protect infrastructure that delivers fiscal benefits primarily to others. For Afghanistan, CASA-1000's partial progress represents a genuine connectivity gain, improved power supply in northern and central provinces, but also a model of engagement that explicitly denies the Afghan state the fiscal sovereignty that a functioning corridor would normally generate.

BRI in Afghanistan

China's BRI was formally extended to Afghanistan through a 2016 Memorandum of Understanding between the Afghan government and China's National Development and Reform Commission, which outlined potential cooperation across infrastructure, trade, and investment [133]. The 2016 MOU and subsequent statements under the trilateral China-Pakistan-Afghanistan frameworks identified a range of planned projects: road upgrades connecting eastern Afghanistan to the Karakoram Highway and CPEC spine; energy infrastructure including power transmission and possible gas connections; and the Mes Aynak copper project as a flagship extractive-sector initiative [133, 218, 225].

As of 2026, the gap between planned and implemented BRI activity in Afghanistan is stark. Of the projects outlined in the 2016 MOU and subsequent statements, none has reached sustained operational status. Mes Aynak remains in the partial-activation phase described in Chapter 3; road upgrade projects have not advanced beyond feasibility discussions; energy infrastructure commitments have not materialized as construction activity [133]. Chinese analysts and officials attribute this gap to security conditions, the sanctions environment, and the recognition problem, Chinese state-owned enterprises cannot easily book Afghan project expenditure through dollar-linked financing channels without exposure to secondary sanctions risk [361]. For Afghanistan, the BRI gap is particularly significant because Beijing's stated ambition, integrating Afghanistan into a China-Pakistan-Central Asia connectivity architecture, would, if realized, provide the country with access to Chinese capital and markets without the governance conditionality attached to Western financing. The fact that this ambition has not been translated into operational infrastructure despite Taliban-ruled Afghanistan's eager signalling of openness to Chinese investment is the clearest evidence that the geopolitical lock operates even within the bilateral Sino-Afghan relationship, independently of Western sanction enforcement.

INSTC and Chabahar Port

The INSTC is a multimodal network linking Russia to India via the Caspian Sea, Iran, and the Persian Gulf, with Afghanistan positioned as a potential eastern branch connecting Central Asia to Chabahar and onward to Indian Ocean markets [198, 199, 238]. Chabahar, operated under a ten-year agreement between India and Iran signed in 2016 and extended in 2024, provides Afghanistan with a non-Pakistani port outlet and India with direct access to Afghan and Central Asian markets bypassing Pakistani territory [262, 263, 267]. For Afghanistan, Chabahar represents the clearest existing alternative to Karachi and Gwadar: The Zaranj-Delaram highway, built with Indian financing, connects Afghan territory to the Iranian border and thence to Chabahar's container terminal.

INSTC's Afghan relevance has been complicated by two recent developments. First, U.S. sanctions on Iran, tightened in 2025, have renewed uncertainty about the Chabahar project's financing and shipping access despite a limited carve-out for Afghan reconstruction-related activity [24, 272]. Second, Israeli military strikes on Iranian infrastructure in the context of the 2025 Gaza-region escalation have affected sections of the Iran-China rail link and raised war-risk insurance premiums for cargo transiting Iranian territory, further increasing the cost uncertainty for INSTC-routed shipments [248, 273]. For Afghanistan, these disruptions mean that Chabahar's role as a sanctions-resilient alternative to Pakistani ports, already limited by Iranian capacity constraints and infrastructure bottlenecks, is further undermined by exogenous geopolitical shocks that neither Taliban-ruled Afghanistan nor its corridor partners can control. The Afghan implication is that corridor diversification strategies that depend heavily on the Iran axis inherit Iran's own structural vulnerabilities alongside their genuine geographic advantages.

TAPI Gas Pipeline

The TAPI gas pipeline is a USD 10 billion project designed to transport approximately 33 billion cubic metres of natural gas annually from Turkmenistan's Galkynysh field to India via Afghan and Pakistani territory [449, 450]. The pipeline was inaugurated in a ceremony at the Turkmen segment in December 2018, and the Afghan segment was symbolically launched in February 2018 with ground-breaking events in Herat attended by the presidents of all four participating states. The project was conceived as both an energy supply solution for Pakistan and India and as a transit-revenue generator for Afghanistan, with estimates of Afghan transit fees in the range of USD 400-500 million annually at full capacity [66].

Construction progress has been limited. The Turkmenistan segment, under Turkmengaz' direct control, was formally completed in 2024. On the Afghan side, a ground-breaking ceremony for the Serhetabat-Herat section was held in September 2024, attended by the presidents of Turkmenistan and Afghanistan and marking the first formal construction activity on Afghan soil [449]. As of late October 2025, however, only approximately 14 km of pipe had been laid inside Afghanistan against a total Afghan route of over 800 km [309, 310, 358]. The Taliban's return had raised hopes that unified territorial control would reduce security risks along the pipeline route, and Taliban-ruled Afghanistan officials have repeatedly expressed willingness to

guarantee security and provide transit easements [451]. Nevertheless, the bulk of financing for the Afghan segment remains unsecured: international energy companies and export credit agencies remain unwilling to underwrite large-scale construction in a non-recognized, sanctioned jurisdiction, India's participation is uncertain, and the TAPI Pipeline Company has not confirmed a full construction schedule for the Afghan leg [449, 452]. For Afghanistan, TAPI represents perhaps the most direct monetization of its corridor geography that requires no new technology, no port, and no gauge conversion, simply a protected right-of-way through Afghan territory, yet even this minimal configuration has not been realized at scale because the structural lock operates at the financing level rather than at the physical or security level alone.

Gwadar Port and the CPEC Connection

Gwadar, a deep-water port in Pakistani Balochistan developed as the centrepiece of the China-Pakistan Economic Corridor, is the preferred southern outlet for the UAP Railway under the Pakistani and Chinese corridor visions described in Section 3.2.6 [7]. The port has a designed capacity of over 400 million tonnes annually once fully developed, and CPEC financing of approximately USD 62 billion has funded road, rail, and energy infrastructure connecting Gwadar to Pakistan's northern regions and to the Karakoram Highway border with China [368, 388]. Pakistan frames Gwadar as the natural maritime endpoint for any Central Asian-South Asian corridor, including a UAP Railway that routes through Afghan territory.

For Afghanistan, Gwadar's significance is double-edged. On one hand, a functioning, Chinese-backed deep-water port at the Arabian Sea terminus of a UAP corridor would provide Afghan exporters with access to global shipping networks at competitive rates, reducing landlocked transport costs and opening South Asian and Middle Eastern markets for Afghan commodities. On the other hand, a Gwadar-centric corridor architecture would embed Afghanistan within a China–Pakistan strategic axis, increasing Afghanistan's dependence on two partners whose political keys, Chinese security guarantees and Pakistani border-management leverage, are already sources of constraint rather than unconditional support. The CPEC debt sustainability concerns documented in Pakistani government and ADB assessments [23], the Baloch insurgent attacks on Gwadar infrastructure [67, 329], and Pakistan's recurrent border-closure diplomacy all represent risks that a Gwadar-dependent Afghan corridor would inherit. The Afghan corridor strategy therefore faces a genuine dilemma: Gwadar offers the best-developed and most directly accessible deep-water port for the UAP axis, but dependence on it consolidates the Pakistan-China alignment that the dissertation's geopolitical lock model identifies as one of the principal sources of Afghan corridor constraint.

Trans-Afghan Railway Technical Standards

The trans-Afghan rail standards problem is not a separate corridor but a cross-cutting technical and institutional constraint that affects the UAP Railway, BRI extensions, and any future rail connection to Iran or India. As discussed in Section 3.2.2.5, the gauge discontinuity between the Soviet 1,520 mm standard used in Central Asia (and on the existing Hairatan-Mazar-i-Sharif line) and the British colonial 1,676 mm standard used in Pakistan means that any through-running freight on a UAP

corridor requires a gauge-conversion facility on Afghan soil [65, 272]. This technical fact has institutional implications that extend beyond engineering: it means Afghanistan must host, operate, and maintain a complex conversion infrastructure for which it currently has no capacity, no regulatory framework, and no trained workforce.

UNECE Trans-European Railway compatibility studies and ADB technical annexes have examined multiple solutions to the gauge problem: variable-gauge axle technology (used on the Spain-France high-speed connection), dual-gauge track (used on the Iberian Peninsula), and conventional transshipment yards where cargo is transferred between wagons of different gauges [23]. Each solution carries different cost, time, and governance implications. Variable-gauge technology is technically sophisticated, expensive per axle, and requires trained maintenance staff; dual-gauge track is capital-intensive and requires a clear decision on alignment standards before construction begins; transshipment yards are operationally simpler but add dwell time and transfer costs that partially erode the corridor's competitive advantage. No joint standards body currently exists among the three UAP countries to coordinate a decision, and Taliban-ruled Afghanistan's transport ministry has not publicly committed to any specific technical solution [364]. Beyond gauge, customs procedures, documentation formats, and axle-load standards also differ between the Central Asian and South Asian rail networks, adding further institutional complexity to through-freight operations. For Afghanistan, the trans-Afghan rail standards problem is a microcosm of the broader governance challenge identified throughout this dissertation: the country sits at the intersection of incompatible technical and regulatory systems inherited from different colonial and Soviet legacies, and resolving these incompatibilities requires precisely the kind of multilateral institutional coordination that the geopolitical lock systematically prevents.

3.5 Two Faces of the Geopolitical Lock

Taken separately, the UAP Railway and Mes Aynak illuminate distinct mechanisms of blockage in Afghanistan's post-2021 connectivity landscape. Taken together, however, they reveal a common causal structure: the operation of a multilevel geopolitical lock in which incompatible external keys, sanctions-shaped financial constraints, and bounded Taliban gatekeeper agency prevent economically rational projects from maturing into integrated, durable forms of connectivity. The value of comparing the two cases lies not in treating them as identical, but in showing how the same analytical model travels across different sectors, actor constellations, and scales of interaction. This section accordingly synthesizes the two cases in order to evaluate Corollary 1 (Great-Power Deadlock), Corollary 2 (Gatekeeper's Constrained Agency), and Corollary 3 (Managed Dissociation) as specified in Chapter 1, demonstrating that structurally similar mechanisms operate across the transport and extractive sectors.

The UAP Railway is a corridor case in the strongest sense. It is embedded in a wide field of systemic and regional rivalry involving the United States, China, Russia, Pakistan, India, Iran, and the contiguous Central Asian states, and its fate depends on the alignment of transport geography, finance, security guarantees, and maritime endpoints across multiple jurisdictions. Mes Aynak is narrower in formal scope but no

less revealing analytically: it is centred on a single major extractive site, a dominant external investor, and the Taliban as sovereign gatekeeper, yet it remains constrained by the same wider environment of sanctions, non-recognition, reputational risk, and fragmented external engagement. The contrast therefore allows the dissertation to observe the geopolitical lock in two forms: as corridor-level deadlock and as project-level constrained bargaining.

In UAP, the dominant mechanism is great-power and regional deadlock. The project is widely recognized as economically rational and potentially transformative, and it has been repeatedly endorsed in feasibility studies, diplomatic forums, and trilateral political signalling, yet it remains stalled because competing actors view the corridor not simply as a trade route but as a strategic asset that could redistribute influence across Eurasia and the Arabian Sea littoral. As the UAP case shows, sanctions exposure, contested financing, unresolved security guarantees, and the terminal rivalry between Gwadar- and Chabahar-linked visions collectively block implementation even where all immediate participants can identify material gains. UAP thus most clearly activates the structural lock and incompatible-keys dimensions of the model, confirming Corollary 1 on great-power deadlock.

In Mes Aynak, by contrast, the dominant mechanism is not multilateral corridor rivalry in the first instance, but the constrained bargaining space of the sovereign gatekeeper under a structural financial and political lock. The Taliban control the territory, seek revenue and legitimacy, and face a partner in China with evident long-term interest in the site's copper reserves, yet these favourable conditions have not produced full-scale extraction or integration into broader supply chains. Instead, the case is marked by contract renegotiations, symbolic restarts, limited preparatory activity, and repeated signals of intent that stop short of decisive capital deployment, largely because sanctions, banking derisking, ESG and reputational concerns, legal uncertainty, and Taliban-ruled Afghanistan's own governance constraints continue to raise the costs of implementation. Mes Aynak therefore most clearly activates the gatekeeper and managed-dissociation dimensions of the model, confirming Corollary 2 and providing strong support for Corollary 3.

The comparison also clarifies that the two cases differ in how gatekeeper leverage operates. In UAP, Taliban-ruled Afghanistan is a necessary territorial actor, but it is only one participant in a densely layered corridor politics in which external powers and regional rivals hold multiple effective vetoes over funding, routing, and risk allocation. In Mes Aynak, the Taliban's leverage is more concentrated because the project depends directly on access to a specific site and on the regime's ability to grant permissions, security, and contract continuity, yet even here the gatekeeper cannot convert territorial control into full project realization because decisive levers remain external to Kabul, especially in global finance and sanctions enforcement. This variation is analytically important: it shows that greater gatekeeper centrality can widen the room for bargaining but does not by itself dissolve the broader lock.

Across both cases, the role of sanctions and financial plumbing is especially striking. In UAP, sanctions and non-recognition undermine the possibility of large-scale multilateral finance, raise insurance and compliance risks, and make major

infrastructure commitments to Taliban-ruled Afghanistan politically and financially difficult even for actors with corridor interests. In Mes Aynak, similar constraints operate through a different channel: they do not eliminate Chinese interest, but they complicate banking access, supplier engagement, insurance, and long-term capital commitment, reinforcing cautious, incremental, and often symbolic forms of engagement rather than comprehensive activation. The comparison therefore supports the claim developed earlier in the dissertation that financial infrastructures function as part of the geopolitical lock, not merely as neutral background conditions.

A further commonality lies in the pattern of outcomes. Neither case corresponds to full unlocking, since neither has generated an operational, integrated corridor or a fully realized extractive project embedded in stable regional and global networks. Yet neither case corresponds to complete isolation either: UAP continues to generate feasibility work, diplomatic coordination, and limited procedural movement, while Mes Aynak has produced renegotiations, ceremonies, and modest on-site activation. The outcome in both instances is instead partial opening without transformation, which is precisely the empirical signature of managed dissociation outlined in the theoretical framework.

Taken together, these contrasts strengthen the dissertation's broader explanatory claim. If only UAP were stalled, one might attribute the outcome mainly to the complexity of multistate corridor politics or to the specific rivalries attached to rail connectivity. If only Mes Aynak was only partially activated, one might attribute the result mainly to mining-sector complexity, heritage concerns, or firm-level risk aversion. But the fact that both a major transport corridor and a major extractive project converge on the same pattern of partial movement without integrated realization suggests that the problem is not project-specific failure alone; it is the operation of a broader geopolitical lock that reproduces fragmentation across sectors.

The cross-case comparison also helps refine the meaning of managed dissociation. In UAP, managed dissociation appears as corridor fragmentation: agreements, feasibility studies, and selective engagement coexist with the absence of a functioning North-South transport artery through Afghanistan. In Mes Aynak, it appears as partial extraction politics: a strategically valuable mining site is kept in motion rhetorically and administratively, but not transformed into a fully financed, internationally integrated production chain. The common denominator is selective connectivity without strategic unlocking, an outcome that preserves limited engagement and bounded gains while preventing Afghanistan from becoming a fully operational, autonomous regional hub. The key dimensions of this comparison are summarized in Table A.3 in Appendix A.

This chapter set out to test the geopolitical lock-and-key model through two core cases that operate at different analytical levels but within the same post-2021 Afghan connectivity environment. The UAP Railway examined the lock at the systemic and regional levels, where corridor politics, rival route preferences, financing constraints, sanctions exposure, and terminal competition combine to prevent the construction of a strategically significant North-South transport axis through Afghanistan. Mes Aynak examined the lock at the level of gatekeeper, investor interaction, where the Taliban's

territorial control and a major Chinese commercial interest generate real bargaining, but not sufficient conditions for full implementation under sanctions, banking constraints, reputational risk, and internal governance limits.

Taken together, the paired analysis shows that Afghanistan's post-2021 connectivity impasse is not best understood as a collection of isolated project failures. Rather, both cases reveal the operation of a multilevel geopolitical lock in which structurally embedded great-power rivalry, incompatible regional strategies, sanctions-shaped financial infrastructures, and bounded sovereign gatekeeper agencies repeatedly convert apparently viable opportunities into stalled, partial, or highly conditional forms of engagement. The empirical record therefore supports the dissertation's core claim that the central obstacle to Afghan connectivity is not the absence of economic rationale, but the political inability to align the keys required for large-scale, durable implementation.

The UAP case provides the strongest support for Corollary 1: Great Power Deadlock. It demonstrates that even where a corridor is economically attractive, regionally desired, and repeatedly advanced through formal agreements and feasibility work, implementation can be blocked once the route becomes entangled in wider strategic competition among the United States, China, Russia, Pakistan, India, Iran, and the contiguous Central Asian states. In this case, the lock operates most clearly through competing corridor visions, endpoint rivalry, unresolved security guarantees, and the inability to mobilize financing under conditions of non-recognition and sanctions.

The Mes Aynak case provides the strongest support for Corollary 2: Gatekeeper's Constrained Agency and substantial support for Corollary 3: Managed Dissociation. It shows that even where the number of central actors is smaller and the material incentives are concentrated around a high-value resource, the Taliban's gatekeeping leverage remains insufficient to overcome the structural lock. Taliban-ruled Afghanistan can renegotiate, signal pragmatism, organize project relaunches, and facilitate limited on-site movement, but it cannot independently restore banking confidence, neutralize sanctions risk, or deliver the full bundle of security, legal, and reputational assurances required for sustained, multibillion-dollar extraction.

What binds the two cases together is their convergence on a shared outcome pattern. Neither case results in integrated unlocking: UAP remains unbuilt in its Afghan segment, while Mes Aynak remains only partially activated and far from full-scale production. Yet neither case reflects total isolation either, since both continue to generate agreements, negotiations, symbolic progress, and narrow forms of engagement. This mixed pattern is precisely what the dissertation terms managed dissociation: selective, fragmented, and reversible forms of connectivity that permit bounded gains for actors while preserving Afghanistan's broader exclusion from integrated corridor systems and stable multilateral frameworks.

The chapter also demonstrates that sanctions and financial plumbing are not secondary background variables but central components of the lock itself. In UAP, they operate by undermining the feasibility of multilateral infrastructure finance and raising legal and political risks around any corridor that passes through Taliban-ruled Afghanistan. In Mes Aynak, they operate through derisking, compliance burdens,

insurance limitations, and reputational costs that inhibit decisive capital deployment even where commercial incentives remain strong. Across both cases, financial infrastructures function as instruments of geopolitical conditioning rather than neutral channels of economic exchange.

The primary interview and survey material reinforces this interpretation. Afghan officials portray the post-2021 order as one of restored territorial control, improved security, and renewed opportunity for transit and investment, but they also acknowledge that sanctions and non-recognition sharply restrict large-scale financing and formal economic normalization. External experts and survey respondents, by contrast, consistently emphasize that sanctions, financial isolation, and rival corridor preferences matter more than narrow technical feasibility in shaping the outcomes of both UAP and Mes Aynak, while also confirming that the Taliban's agency is real but structurally bounded. This convergence between documentary and primary qualitative evidence strengthens the validity of the geopolitical lock-and-key explanation.

For the period under study, the combined evidence most closely corresponds to the managed dissociation equilibrium specified in Chapter 1. Afghanistan is neither fully isolated nor genuinely integrated; instead, it is selectively connected through feasibility studies, bilateral bargaining, symbolic project activation, and narrow sectoral initiatives that remain vulnerable to external pressure and internal reversal. The chapter therefore provides the empirical foundation for the next stage of the dissertation, which synthesizes these findings, refines their theoretical implications, and assesses the realistic future scenarios and policy choices that follow from Afghanistan's persistence as a strategically constrained, partially connected space.

4: PROSPECTS FOR AFGHANISTAN'S CONNECTIVITY BETWEEN CENTRAL ASIA AND SOUTH ASIA: SYNTHESIS, SCENARIOS, AND POLICY IMPLICATIONS

The chapter proceeds in four steps. Section 4.1 sets out the general analytical picture that Chapters 2 and 3 have produced and distinguishes the principal approaches through which connectivity between Central Asia and South Asia might be unlocked. Section 4.2 develops three future scenarios, specifying for each its causal logic, its observable indicator signature, and the evidence that would falsify it. Section 4.3 derives differentiated policy implications for Central Asian, South Asian, and external actors. Section 4.4 returns to the analytical model itself and assesses its explanatory reach, testing the central hypothesis and the three corollaries against the combined case evidence and weighing the model against the principal alternative explanations, so that the chapter closes with the formal evaluation on which the Conclusion builds.

This chapter contributes primarily to Research Task 5 by synthesizing findings across the two cases, assessing the explanatory power of the model vis-à-vis alternative accounts, and developing scenarios and policy recommendations for regional and external actors.

The preceding empirical chapter demonstrated that Afghanistan's post-2021 connectivity trajectory is best understood not as a series of isolated project failures, but as the outcome of a broader geopolitical lock operating across multiple levels of analysis. The UAP Railway showed how a technically plausible and economically attractive corridor can remain stalled when implementation depends on the alignment of rival great powers, competing regional actors, and mutually incompatible political and security conditions [23, 65]. Mes Aynak, by contrast, showed that even a narrower bilateral project built around a commercially significant asset and a willing external investor does not escape this wider structure, because sanctions, banking restrictions, reputational risk, contractual uncertainty, and the bounded agency of Taliban-ruled Afghanistan continue to obstruct full implementation [133, 140].

Taken together, the two cases illuminate different pathways through which the same lock operates. UAP reveals the lock at the corridor level, where great-power rivalry, port competition, route promotion, and financing constraints prevent a multiactor transport project from moving from feasibility to construction [20, 22, 23]. Mes Aynak reveals the lock at the project level, where a more concentrated bargain between the gatekeeper and a major investor still fails to reach full activation because the broader architecture of sanctions and non-recognition constrains both parties' room for manoeuvre [133]. This chapter synthesizes these findings, evaluates the dissertation's hypotheses and corollaries, develops a forward-looking scenario analysis, and derives policy implications for the principal actors shaping Afghanistan's connectivity environment [20, 22, 25].

4.1 Afghanistan Between Central Asia and South Asia: Analytical Overview and Approaches to Unlocking Connectivity Error! Bookmark not defined.

This chapter turns from the explanation of the deadlock to its prospects. Before scenarios and policy implications are developed, this section establishes the analytical

picture that the preceding chapters have produced and sets out the principal approaches through which connectivity between Central Asia and South Asia might be unlocked. It is deliberately general in character: it states what kind of problem Afghan connectivity is, what the evidence of Chapters 2 and 3 has established about it, and which families of solution are available in principle. The formal assessment of how far the analytical model accounts for that evidence is conducted separately in Section 4.4.

Three general findings frame everything that follows. First, the deadlock is multi-level. It is not produced at any single point but by the interaction of systemic rivalry among the United States, China, and Russia; regional competition among Pakistan, India, and Iran over which gateway will serve Central Asian cargo; and the constrained position of the territorial authority in Kabul. Second, the deadlock is produced rather than residual. The corridor and resource projects examined were technically feasible, economically certified, and politically endorsed, and they nonetheless failed to reach financial close, which locates the binding constraint in political and financial conditions rather than in engineering, demand, or security in the narrow sense. Third, the deadlock is asymmetric in its remedies. Most of the improvements that regional states are capable of delivering, in route selection, customs procedure, gauge standards, and segment financing, do not address the conditions that actually bind, while a narrow class of change in the sanctions and recognition environment would alter the calculus of every participant at once.

Against this picture, four broad approaches to unlocking Central Asia-South Asia connectivity can be distinguished analytically. Each rests on a different theory of what the fundamental obstacle is, and each is examined against the evidence in the sections that follow.

The functional-incremental approach. This is the approach implicit in most regional and institutional practice. It holds that connectivity is built cumulatively through technical work, that demonstrated commercial benefit generates political momentum, and that corridors advance by the accumulation of feasibility studies, memoranda, harmonized procedures, and pilot shipments. Its record in the Afghan case is instructive: two decades of such work produced a highly prepared set of projects and no completed trans-Afghan corridor. The approach is not worthless, since it lowers the cost of a future opening and maintains institutional capacity, but the evidence of Chapter 3 indicates that it cannot by itself deliver unlocking, because it addresses a constraint that was never binding.

The bilateral-transactional approach. This approach proceeds through discrete arrangements between the authorities in Kabul and individual external partners, each ring-fenced from the wider political question: a mineral concession, an electricity contract, a single rail segment, a customs arrangement. It is the approach that has in fact produced most of the observable movement since 2021, and its attraction is that it requires no change in recognition or sanctions status. Its limitation is structural rather than practical. Because each arrangement is deliberately insulated so that it can be reversed, the arrangements do not aggregate; the same design feature that makes them possible prevents them from becoming a corridor. This is the mechanism the dissertation terms managed dissociation.

The multilateral-institutional approach. This approach seeks to move the question into formats where risk is distributed and no single actor bears the reputational cost of engagement: development bank consortia, regional organizations, United Nations-facilitated arrangements, and standardized compliance instruments. Its strength is that it addresses the financial and legal exposure that deters commercial participants, and the CASA-1000 governance architecture demonstrates that a workable template exists. Its weakness is that multilateral institutions are themselves constrained by the sanctions and recognition positions of their principal shareholders, so that the approach can prepare an opening but cannot create one.

The conditional-political approach. This approach addresses the binding constraint directly, through a calibrated and revocable adjustment of the sanctions environment tied to verifiable performance by the gatekeeper. It is the only approach whose logic reaches the condition that the evidence identifies as decisive, and it is correspondingly the least likely to be adopted, since it requires the actor with the least immediate interest in Afghan connectivity to move first. Its feasibility depends on being framed narrowly, at the level of a single project rather than of the regime, and on being designed as a replicable template rather than as an ad hoc exception.

These four approaches are not mutually exclusive, and the analysis that follows treats them as complementary rather than competing. The functional and bilateral approaches sustain the present equilibrium; the multilateral approach prepares the ground; only the conditional-political approach can shift the outcome, and it becomes more attractive to its holder the more thoroughly the other three have been pursued. This relationship, in which the approaches available to regional actors do not themselves unlock connectivity but lower the threshold at which the decisive actor would find unlocking acceptable, is the organizing insight of the remainder of the chapter. Section 4.2 develops it into three future scenarios, Section 4.3 into differentiated policy implications for the actors concerned, and Section 4.4 returns to the analytical model to assess how far it accounts for the evidence assembled.

4.2 Three Scenarios for Afghanistan’s Connectivity

The evidence suggests three broad scenarios for Afghanistan's medium-term connectivity trajectory. These scenarios are not equally likely; rather, they form an analytical spectrum ranging from continued structural blockage to partial unlocking under altered geopolitical conditions [20, 21, 25].

Each scenario is assessed against the outcome benchmarks specified in Section 1.4, which distinguish unlocking, complete isolation, and managed dissociation. It should be underlined that managed dissociation is not a speculative projection: it is the empirically dominant pattern already observed across 2021-2026, and the scenario analysis asks whether that pattern consolidates, tightens into deadlock, or partially loosens.

Under sustained deadlock, Afghanistan remains cartographically central but functionally marginal. Major corridor initiatives continue to produce declarations, feasibility studies, and periodic diplomatic momentum, but they do not cross into large-scale implementation because the underlying keys remain misaligned and no actor is

willing to bear the political and financial cost of unlocking on terms that advantage a rival [22, 23, 65].

This scenario is most likely to prevail if three conditions reinforce each other: first, continued U.S. sanctions tightening or a high-profile terrorism incident triggering new designations, which would deepen the financial lock and deter intermediaries from maintaining current facilitation roles; second, a collapse of Sino-Afghan relations over Mes Aynak, for instance, an ISKP attack on Chinese personnel or a unilateral Taliban-ruled Afghanistan contract termination, eliminating the primary bilateral channel through which limited connectivity currently proceeds [227, 340, 412]; and third, a Pakistani border-closure decision in response to sustained TTP attacks, severing the UAP corridor's Pakistani segment politically. Expert survey respondents from Pakistan (R1, R3, R7) identified border-closure risk as a realistic near-term contingency given the state of bilateral security tensions in 2025-2026. In this scenario, UAP remains suspended between endorsement and non-construction, while Mes Aynak continues to oscillate between symbolic activation and delayed extraction [133]. Afghanistan's connectivity landscape would remain defined by unrealized potential, recurrent diplomatic signalling, and the reproduction of dependence without strategic integration [90, 91, 453].

Analytically, sustained deadlock corresponds to the maximal configuration of the geopolitical lock: all three systemic keys remain unturned, regional rivalry continues to generate competing rather than converging corridor proposals, and the gatekeeper's bargaining position deteriorates rather than consolidates. Its indicator signature is distinctive. At the systemic level it would appear as the extension or tightening of designations, the absence of any project-specific carve-out, and the continued refusal of multilateral lenders to underwrite Afghan segments. At the regional level it would appear as the accelerated development of bypass routes, with Pakistani, Iranian, and Russian corridor investment concentrating on alignments that exclude Afghan territory altogether. At the gatekeeper level it would appear as declining customs and transit revenue, a widening gap between declared and implemented infrastructure commitments, and increased reliance on informal or barter arrangements.

This scenario would be falsified by the appearance of any of three observations: the disbursement of multilateral financing against an Afghan segment of a cross-border project; the signature of a binding construction contract, as distinct from a memorandum of intent, by a solvent international contractor; or a formal narrowing of sanctions scope that names an Afghan infrastructure or extractive project. The absence of all three through the period under study is what sustains the scenario's plausibility; their appearance would move the case toward one of the two alternatives below.

Managed Dissociation: The Most Probable Equilibrium

Managed dissociation is the most plausible medium-term scenario because it best fits the pattern observed across the empirical cases and supplementary examples such as CASA-1000's ring-fenced Afghan segment and cautious bilateral transit initiatives [23, 89, 90]. In this trajectory, Afghanistan is not fully cut off; instead, it is selectively embedded through narrow, issue-specific, and politically controlled arrangements that generate limited benefits without transforming the broader regional order [20, 21, 25].

This scenario may include ring-fenced electricity transmission, limited border and customs facilitation with neighbouring states, bilateral mining cooperation, and geographically narrow infrastructure upgrades that do not require full normalization of Taliban-ruled Afghanistan or convergence among rival great powers [23, 89, 90]. Such arrangements may improve local or sectoral outcomes and generate revenue or tactical leverage for the gatekeeper, but they would stop short of creating a stable, integrated corridor linking Central Asia to the Indian Ocean through Afghanistan [25, 26, 27].

The analytical significance of managed dissociation is that it is an equilibrium rather than a transitional stage. Each participating actor obtains enough to justify continued engagement and too little to alter its strategic position: external powers preserve the option value of presence without conceding recognition; regional states retain commercial access without assuming irreversible exposure; and the gatekeeper secures revenue and symbolic validation without meeting the conditions attached to full integration. Because no participant's incentives push toward escalation, the arrangement is self-reproducing. This is precisely why it should not be read as incremental progress toward unlocking: the mechanisms that make partial deals possible are the same mechanisms that prevent those deals from aggregating into a corridor.

Its indicator signature is the coexistence of activity and stagnation. Observable markers include the proliferation of memoranda without financial close; ring-fenced payment and governance architectures that route revenue around the central authority; sector-specific agreements in electricity, mining, or customs that contain no expansion clause; the continued operation of short cross-border segments alongside the non-construction of the connecting trunk; and reversibility clauses that allow counterparties to exit at low cost. The dissertation's two cases display this signature directly, and the pattern recurs across the supplementary corridors examined in Section 3.4, which is what warrants treating managed dissociation as the modal outcome rather than a description of two particular projects.

Partial Unlocking: Conditions and Triggers for Change

The least likely but most transformative scenario is a partial unlocking of the geopolitical lock. This would require simultaneous movement on several fronts: some reduction or compartmentalization of great-power rivalry around Afghan corridors, calibrated changes in sanctions and financial access, greater legal and political predictability in dealings with Taliban-ruled Afghanistan, and moderation of the endpoint rivalries that currently divide route options [20, 21, 94].

Three specific trigger configurations could produce conditions for partial unlocking. First, a calibrated U.S. sanctions adjustment modelled on the Chabahar precedent: a formal OFAC carve-out for a named Afghan project, most plausibly Mes Aynak copper or the UAP Railway, linked to specific, measurable benchmarks such as verified counterterrorism cooperation on ISKP. Experts E1 identified this as the most realistic template for near-term partial unlocking, noting that the CASA-1000 ring-fenced model demonstrates U.S. and World Bank frameworks can be redesigned to allow connectivity without formal recognition. Second, a Chinese sovereign financing guarantee for Mes Aynak structured through a non-dollar clearing network, providing

MCC with state-backed insurance against sanctions exposure. Survey respondents from Afghanistan (R5, R9, R11) expressed cautious optimism that a Sino-Afghan bilateral deal at Mes Aynak was achievable within five years if ISKP activity in Logar declined; respondents from Pakistan (R1, R7) were more sceptical, pointing to Chinese caution following CPEC security incidents as a precedent for extreme risk aversion in less stable environments. Third, a normalization step by Uzbekistan, which has the strongest corridor incentives and most direct Taliban-ruled Afghanistan relationship, involving a legally binding treaty granting Taliban-ruled Afghanistan sovereign-counterparty status needed to access ADB or AIIB financing for UAP, which would change the legal landscape for corridor finance even without Western endorsement [23, 179]. Under such conditions, projects like UAP could become bankable and politically tolerable to a wider coalition of actors, while Mes Aynak could move from symbolic relaunches and exploratory work toward sustained extraction and value-chain infrastructure [23, 65, 133]. Yet the conditions required for this scenario remain highly demanding, which is why it should be treated as a contingent medium-horizon possibility rather than a near-term expectation, and why expert interviewees and survey respondents across all three national groups consistently ranked managed dissociation as far more probable than partial unlocking over the next decade.

What distinguishes partial unlocking from managed dissociation is not the volume of activity but its architecture. Managed dissociation produces arrangements that are deliberately insulated from one another; partial unlocking would produce arrangements designed to connect. The decisive observable is therefore whether a given agreement contains provisions for extension, interoperability, or third-party accession. A ring-fenced electricity contract that cannot be expanded into a regional grid belongs to the second scenario; a customs and payment framework explicitly built to accommodate additional corridor segments belongs to the third.

The conditions for such a shift are demanding but specifiable, and this is the analytical payoff of the lock-and-key frame. Because the model identifies which actor holds which key, it also identifies which changes would matter and which would not. Improvements in Afghan security conditions, additional feasibility work, or further ministerial endorsement would not by themselves shift the outcome, since none of these addresses a key. Conversely, a single calibrated adjustment in the financial key held by Washington, coupled with a verifiable counterterrorism commitment from the gatekeeper, would alter the incentive structure for every other participant simultaneously, because it is the sanctions exposure of intermediaries rather than the preferences of regional states that currently prevents financial close. This asymmetry, in which most plausible improvements change nothing while one narrow class of change would change a great deal, is the central practical finding of the dissertation.

Corroborating Evidence: Regional Middle-Power Strategies Under the Lock

The scenario assessment above is derived from the two principal cases. It can be tested further against the observable conduct of the regional states that would gain most from unlocking. If managed dissociation is genuinely an equilibrium rather than a transitional stage, then the states best placed to invest in trans-Afghan connectivity should be found designing their engagement to be reversible, insulated, and separable

from questions of political status. Two studies conducted by the author during this research, on Uzbekistan and Kazakhstan respectively, bear directly on that expectation, and their conclusions are restated here in the vocabulary of the lock-and-key frame [168, 173].

Uzbekistan is the harder test, because it initiated the UAP Railway and holds the strongest material interest in a functioning trans-Afghan corridor. The study of Afghanistan-Uzbekistan relations after 2021 concludes that Tashkent has institutionalized a doctrine of strategic pragmatism: an ordering of policy around observable national interests, namely economic connectivity, energy exports, and border security, pursued through direct transactional dealings with the de facto authorities while formal recognition is withheld. The outcome is characterized there as strong economic integration combined with low political trust, in which trade, electricity, and transit become the instruments through which Uzbekistan influences Afghan stability while securing its own [168].

Three features of that finding matter here. First, the engagement is asymmetric and therefore politically fragile: Uzbek exports of approximately USD 855.9 million in 2024 stand against Afghan exports of some USD 28.3 million, an imbalance the study identifies as a source of potential resentment rather than of deepening interdependence [168]. Second, the sequence of institutionalization, comprising the 2022 Border Management and Security Agreement, the 2022 electricity trade arrangement, the 2023 transit agreement and preferential tariff scheme, and the July 2025 tripartite framework agreement on the joint feasibility study, produced instruments that regulate flows and manage risk without committing Tashkent to irreversible construction. Third, the study characterizes the posture as a strategized gamble whose viability depends on conditions Tashkent does not control: Taliban governance capacity, the Qosh Tepa water dispute, the possible southward diversion of trade through CPEC, and the unresolved sanctions regime [168].

Translated into the frame developed here, Uzbekistan behaves as an actor that has accepted the lock as an operating condition rather than a problem it can solve. It invests in the segments it controls, maintains working-level channels with the gatekeeper sufficient to keep existing flows moving, and defers the capital-intensive trunk investment that would require the systemic keys to be turned. The contrast between the ratification of framework and feasibility instruments and the continuing absence of financial close on construction is precisely the indicator signature of managed dissociation specified above. That the state with the strongest incentive to escape the lock behaves in this way is stronger evidence for the equilibrium reading than the stalling of any single project.

The Kazakh case supplies the complementary mechanism from a non-contiguous position. The study of Kazakhstan’s engagement with Taliban-ruled Afghanistan concludes that Astana has developed a repertoire of pragmatic non-recognition resting on three practices: the multilateralization of Afghanistan-related security concerns through the CSTO and the SCO in preference to visible bilateral security arrangements; incremental, risk-managed connectivity expressed in high-volume but reversible commodity trade and consortium-based participation in Trans-Afghan corridor

planning rather than sunk-cost infrastructure investment; and narrow legal-technical instruments, namely the domestic delisting of the Taliban, the appointment of a special presidential representative, and the hosting of United Nations-facilitated talks in Almaty, which deepen functional cooperation while preserving the formal boundary short of recognition [173].

Each of these practices engages a sovereign gatekeeper without turning any key, and the study identifies the mechanisms that make them work: multilateral buffering, which converts visible bilateral coordination into institutional coordination and lowers its reputational cost; reversibility, which preserves exit options while keeping Afghanistan on the connectivity map; and legal insulation, by which narrow technical instruments reduce transaction barriers without altering legal status [173]. The study concludes that these elements are better explained jointly, as a single repertoire, than as separate responses to commercial or geopolitical pressures, and that non-recognition is best understood not as a fixed legal status but as a dynamic political practice varying across issue domains.

Read together, the two cases identify the demand side of managed dissociation and refine two elements of the model. The dissertation's own case studies establish that external and regional powers withhold the conditions required for integrated connectivity; the Uzbek and Kazakh evidence establishes that the states most exposed to that withholding respond by engineering reversibility into their own engagement rather than by pressing for the lock to be opened. The equilibrium is therefore sustained from both directions at once. The first refinement concerns the sovereign gatekeeper: recognition operates less as a binary threshold than as a graduated field in which states calibrate legal, diplomatic, and commercial engagement independently of one another, which explains how Taliban-ruled Afghanistan accumulates functional relationships yet cannot convert them into financeable infrastructure. The second concerns position: the contrast between contiguous Tashkent and non-contiguous Astana shows that exposure determines the instrument mix, with the contiguous states leaning toward direct security coordination and cautious economics, and non-contiguous states outsourcing security to regional institutions while concentrating on reversible commercial instruments.

The two studies also bear on the scenario probabilities. Because Kazakhstan's instruments are explicitly designed to be reversible and Uzbekistan's commitments are concentrated in segments that do not require external financial clearance, neither state's behaviour would change substantially under sustained deadlock, and neither is positioned to trigger partial unlocking on its own. Middle-power agency in this system is real but bounded: it can preserve connectivity options, keep Afghanistan on the regional map, and lower the transaction costs of a future opening, but it cannot substitute for the systemic keys. This supports the assessment that the medium-term distribution of outcomes is weighted toward managed dissociation, and that movement toward partial unlocking depends on changes originating outside the region.

Comparing Scenarios: Which Outcome is Most Plausible?

Among the three scenarios, managed dissociation appears the most plausible for the medium term. Complete sustained deadlock remains possible, especially if

sanctions harden further and regional security deteriorates, but the observed persistence of limited bargaining and narrow engagement suggests that actors still seek selective access even within the lock [23, 89, 90]. By contrast, a grand bargain would require changes in sanctions policy, recognition practices, Taliban governance behaviour, and great-power relations that are not currently visible at sufficient scale [24, 94, 193].

The comparison can be stated more precisely. The three scenarios are not equally probable, and they are not independent: sustained deadlock and partial unlocking are the tails of a distribution whose centre is managed dissociation. Movement toward either tail requires a change in the same small set of variables, namely the financial key held by the United States, the security key held jointly by Washington and Beijing, and the credibility of the gatekeeper's commitments. Deterioration in these variables produces deadlock; calibrated improvement produces partial unlocking; their persistence in current form produces continuation of the present equilibrium. This is why the dissertation treats the identification of key-holders, rather than the forecasting of outcomes, as its principal analytical contribution: the scenarios are read off the configuration of keys, and any change in that configuration revises the scenario assessment in a specified direction.

Two qualifications should be entered. First, the assessment is conditional on the period examined and on the sanctions architecture as it stood at the close of the study; a substantial reordering of great-power relations would require the analysis to be re-run rather than merely updated. Second, managed dissociation is the most probable outcome, not the most desirable one. It preserves minimal connectivity at the cost of foreclosing the developmental gains that motivated the corridor projects in the first place, and its persistence should be understood as a policy failure that is stable rather than an interim arrangement that is progressing. The policy implications set out in the following section are framed accordingly.

4.3 Policy Implications for Central Asian, South Asian, and External Actors

The dissertation's findings do not support policy based on the assumption that economic rationality alone will unlock Afghanistan's regional role. A more realistic policy approach begins from the recognition that major actors operate within a structurally fragmented environment and must decide whether to adapt to that environment, reshape it incrementally, or attempt to bypass it [8, 20, 22].

Central Asian States: Building Corridor Momentum While Managing Sanctions Risk

For the Central Asian states, the findings suggest that proactive corridor diplomacy remains rational, but expectations should be calibrated. Supporting UAP and related North-South projects can preserve strategic options and keep Afghanistan tied to regional planning, but large-scale implementation will remain unlikely without parallel progress on sanctions exposure, risk guarantees, and legally workable financing mechanisms [23, 309, 310].

The more prudent approach is therefore dual-track. Central Asian actors should continue backing long-horizon corridor visions while simultaneously investing in smaller, modular, and sanction-resilient forms of engagement such as logistics harmonization, border infrastructure, electricity swaps, and narrowly framed

commercial arrangements that generate incremental gains without depending on full geopolitical convergence [89, 90, 91].

The empirical evidence from this dissertation allows a more specific and actor-differentiated set of policy recommendations for the Central Asian states. All five are treated below, in an order reflecting the character rather than the scale of their contribution: Kazakhstan, whose leverage is institutional, financial, and legal-diplomatic rather than territorial; Uzbekistan, the principal architect of the UAP Railway and Afghanistan's most consequential Central Asian neighbour; Turkmenistan, whose neutrality and westward corridor orientation supply an alternative axis; Tajikistan, holding the longest Afghan frontier but the least attainable key; and Kyrgyzstan, a non-contiguous upstream supplier whose modest participation is analytically revealing. A sixth dimension, the collective challenge of sanctions-resilient financing, follows the country treatments.

***Kazakhstan**:* trade facilitation and the Trans-Caspian corridor complement. Kazakhstan's relationship with the UAP Railway is less direct than Uzbekistan's but strategically significant. As the largest Central Asian economy and the primary transit hub connecting the Caspian region to Chinese markets via the Trans-Caspian International Transport Route (TITR or Middle Corridor), Kazakhstan has a complementary interest in the UAP axis: if Afghan territory could be reliably transited, Kazakh exporters would gain a shorter southern outlet to Indian Ocean ports that does not depend on Russian or Iranian infrastructure. Expert survey respondent E1 (Kazakhstan) noted that Kazakh logistics firms are already exploring multi-modal combinations involving Caspian ferry services, Uzbek rail, and theoretical Afghan transit, but risk premiums remain prohibitive without sanctions clarity and infrastructure assurance. The implication for Kazakhstan is threefold. First, Astana should leverage its role in CAREC and UNECE transport bodies to push for technical standards harmonization between the Soviet broad-gauge network and Pakistani-gauge infrastructure, making gauge-conversion planning bankable before the full railway is built. Second, Kazakhstan's bilateral trade with Afghanistan, modest at present but growing in cement, flour, and manufactured goods, could be expanded through targeted customs facilitation agreements with Taliban-ruled Afghanistan that do not require formal recognition but create practical commercial precedents. Third, given Kazakhstan's accreditation of a Taliban envoy in 2023 without formal recognition, Astana has political space to deepen working-level engagement that other Central Asian states, more exposed to Russian security pressure, currently lack [313, 335].

Why Kazakhstan's position is different in kind. Kazakhstan is the only actor in this group that does not border Afghanistan. It shares no border with Afghanistan, its exposure to Afghan instability is indirect, and its corridor interest is derivative rather than immediate. This changes the character of its leverage rather than reducing it. Where Uzbek influence is territorial and Turkmen influence is physical and doctrinal, Kazakh influence is institutional, financial, and legal-diplomatic: convening authority in CAREC, the SCO, and UNECE transport bodies; the largest capital base in the region; and, uniquely, a demonstrated method for engaging Kabul without conceding status. The author's analysis of Kazakhstan's engagement identifies that method as

pragmatic non-recognition, resting on multilateralized security hedging, deliberately reversible economic commitments, and narrow legal-technical instruments such as domestic delisting and special-envoy diplomacy [173]. For the corridor question this matters because Astana can hold conversations, convene formats, and sign technical instruments that Afghanistan's immediate neighbours cannot hold without the act itself being read as political endorsement.

The limits of political space. That latitude should not be mistaken for decisive capacity. Political space is not the binding key; financing and sanctions exposure are, and Kazakhstan holds neither. Astana can reduce the transaction costs of engagement but cannot underwrite a multi-billion-dollar Afghan segment, and its own instruments are designed to be reversible precisely so that they can be withdrawn if conditions deteriorate. A further constraint is internal to Kazakh strategy: the Middle Corridor absorbs the political attention, capital, and institutional energy that a trans-Afghan commitment would also require, and the two compete for the same scarce resources. The trans-Afghan axis is a hedge for Kazakhstan, not a necessity, which sets a ceiling on how much risk Astana will rationally assume. The appropriate policy conclusion is therefore not to ask Kazakhstan to lead financially, which it will not do, but to ask it to lead institutionally, where its comparative advantage lies: converting its convening authority into a single deliverable, namely a common regional compliance and documentation standard developed jointly with the international financial institutions, which is the one contribution no other regional state is positioned to make.

Uzbekistan: from corridor diplomacy to corridor realism. Uzbekistan has pursued the most proactive corridor diplomacy of any Central Asian state since 2021, securing the July 2025 trilateral UAP framework agreement, ratifying it domestically in February 2026, and designating the Ministry of Transport as lead implementing agency. Expert interviewees E1 and E2 both described Uzbek corridor diplomacy as genuinely strategically motivated rather than merely declaratory, Tashkent needs reliable sea access that bypasses Russian and Chinese-controlled routes, and the UAP Railway is the shortest geographic option. This creates a structural incentive that will not disappear regardless of short-term setbacks [23, 309, 310]. However, the dissertation's analysis reveals a critical gap between Uzbekistan's diplomatic momentum and its ability to address the structural constraints that block construction. Tashkent can sign MOUs and ratify frameworks, but it cannot substitute its own credit for the missing multilateral financing, compel Taliban-ruled Afghanistan customs reform at the pace a bankable project requires, or override U.S. sanctions exposure for third-country contractors and banks. The practical implication for Uzbekistan is therefore a shift from corridor diplomacy to corridor realism: alongside UAP advocacy, Tashkent should invest in intermediate-level infrastructure that is less politically exposed, border-crossing modernization at Hairatan, TIR customs harmonization, and digitized freight documentation, that generates tangible trade facilitation gains regardless of whether the full railway materializes. Survey respondent R4 (Afghanistan) and E1 (Kazakhstan) independently identified Hairatan border-management reform as the single highest-leverage short-term step available within the current political constraints.

Why Uzbekistan's position is structurally unique. The case for treating Tashkent as the pivotal regional actor rests not on diplomatic activism alone but on a combination of assets that no other Central Asian state possesses simultaneously. Uzbekistan shares a land border with Afghanistan, the shortest of its external borders but by far its most commercially active, anchored on the Termez-Hairatan crossing. It operates the only functioning cross-border railway into Afghan territory, the Hairatan-Mazar-i-Sharif line built with Asian Development Bank support and running since 2011, whose operating and maintenance contract has been extended through 2026 [23, 442]. It supplies a substantial share of Afghanistan's imported electricity under long-term contracts. And it is the initiator of the only trans-Afghan corridor framework that has advanced from declaration to ratification, having secured the trilateral agreement of July 2025 and completed domestic ratification in February 2026 [75, 81, 87]. Other regional states hold one or two of these; Uzbekistan holds all four. In the vocabulary of the model, this means that the portion of the lock that lies within regional reach is disproportionately in Uzbek hands, and that Tashkent is the actor whose key is closest to being turnable.

Cooperative vision and the dependency dilemma. The author's analysis of Afghanistan-Uzbekistan relations after 2021 characterizes Tashkent's posture as strategic pragmatism: policy ordered around observable national interests in connectivity, energy exports, and border security, pursued through direct transactional dealings with the de facto authorities while formal recognition is withheld [168]. This produces a genuinely cooperative vision, but it also produces a dilemma that policy must confront rather than obscure. The instruments that give Uzbekistan leverage over Afghan outcomes, namely electricity supply, commodity trade, and control of the northern rail gateway, are the same instruments that expose it: supply interruptions arising from unpaid Afghan bills or from attacks on transmission infrastructure rebound on Tashkent's own reliability as a corridor partner. The trade relationship compounds this, since the marked asymmetry between Uzbek exports and Afghan exports sustains a structural imbalance that generates dependency rather than interdependence and carries the risk of resentment on the Afghan side [168]. Border contiguity also means that Uzbekistan cannot treat engagement as optional in the way a state without a shared border can, which is why security cooperation was institutionalized early through the 2022 border management arrangement. The practical consequence is that Uzbek policy should be designed to reduce asymmetry deliberately, through preferential access for Afghan agricultural exports and support for Afghan processing capacity, rather than allowing the imbalance to widen as trade volumes grow.

From advocacy to demonstration: the highest-value use of Uzbek capacity. The most consequential contribution Uzbekistan can make is not further advocacy for the full railway but the conversion of the segment it already controls into a demonstration corridor. Operating the Hairatan-Mazar-i-Sharif line under published tariffs, auditable customs procedures, digitized freight documentation, and a payment channel structured so that flows can be verified by a third party would generate precisely the class of evidence that the holders of the financial key require and that no volume of ministerial endorsement can substitute for. This is achievable within existing constraints: it

involves territory whose control is undisputed, requires no new construction, and creates no sanctions exposure of the kind that deters contractors and banks from the trunk project. Extending the same standards southward toward Naibabad and Sheberghan, and coordinating them with the Turkmen crossing in the west so that two independent corridors operate under a common documentary regime, would convert a single working line into a regional compliance precedent. That precedent, rather than the corridor diplomacy that has already been conducted with considerable skill, is what would lower the threshold for the actors whose consent Uzbekistan cannot supply on its own.

Turkmenistan: neutrality as corridor latitude, and the westward alternative. Turkmenistan occupies the second position among Central Asian states in Afghanistan's connectivity politics, and its role is distinct in kind rather than merely smaller in scale. It shares an 804-kilometre border with Afghanistan, the second-longest of the Central Asian states after Tajikistan's, running from the Iranian tripoint to the Uzbek tripoint, and it possesses an operating rail crossing at Serhetabat-Torghundi, where Turkmen 1,520-millimetre gauge track already reaches Afghan territory. From that crossing, the planned Turgundi-Herat line of roughly 173 kilometres would connect the Turkmen network to Afghanistan's principal western city. Ashgabat is also the depositary of the Lapis Lazuli transit and transport agreement, concluded with Afghanistan, Azerbaijan, Georgia, and Türkiye, which defines a westward corridor from Afghan territory across the Caspian toward Turkish and European markets [86, 447]. Turkmenistan therefore holds an existing physical connection, a short and technically modest extension project, and a multilateral corridor framework that is entirely independent of the Pakistani terminus.

The analytical significance of Turkmen neutrality. Turkmenistan's constitutionally entrenched permanent neutrality is usually treated as a source of passivity. Within the lock-and-key frame it is better understood as a form of latitude. Because Ashgabat's foreign policy doctrine precludes alignment, its engagement with the authorities in Kabul carries a lower political cost than equivalent engagement by states whose relations with Washington, Moscow, or Beijing would be read as signalling. Turkmenistan can host, contract, and operate across the border without the recognition debate that constrains its neighbours, and without its commercial arrangements being interpreted as endorsement. This is the same logic that Kazakhstan achieves through legal-technical instruments and that Uzbekistan achieves through explicit transactionalism, but Turkmenistan obtains it structurally rather than through active management. The corollary is that Turkmenistan's corridor vector runs west rather than south: its projects reach the sea through the Caspian and Anatolia, not through Karachi or Gwadar. This makes Turkmenistan a complement to the UAP axis rather than a competitor with it, since the two address different endpoint problems, and it means that Turkmen participation does not engage the Pakistan-India rivalry that constrains the southern alignments.

What TAPI demonstrates about the limits of that latitude. The Turkmenistan-Afghanistan-Pakistan-India gas pipeline is the clearest available test of whether

neutrality and physical proximity are sufficient to move a project, and the answer is instructive. The pipeline has been under negotiation for decades; its first phase, from Serhetabat to Herat, remains the only segment with meaningful progress; and reporting on that progress has been consistently characterized as modest relative to the scale of the declared ambition [358, 449]. The project's viability continues to depend on the participation of India and Pakistan, without which the downstream economics do not close [450, 452]. The constraint, in other words, does not lie in Ashgabat, in Turkmen willingness, or in the security of the northern segment. It lies downstream, in the political relations of the endpoint states and in the financing environment that surrounds them. This reproduces exactly the structure the dissertation identifies elsewhere: the actor closest to the project and most willing to proceed is not the actor holding the binding key. Turkmen neutrality lowers the political cost of engagement; it does not supply the financial or the endpoint keys, and no amount of Turkmen initiative can compensate for their absence.

The corresponding policy implication. Turkmenistan's most productive contribution is therefore to concentrate on what lies within its unilateral capacity and to avoid staking its corridor strategy on projects whose constraints sit outside the region. Three measures meet that test. The first is completion of the Turgundi-Herat railway, a short extension across comparatively secure western terrain that would give Afghanistan a second functioning international rail gateway and would establish Herat as a logistics node serving both the Iranian and the Caspian directions. The second is the sustained and transparently metered supply of electricity to western and northern Afghanistan, which builds the same operational and payment record that this dissertation identifies as the evidence external key-holders actually respond to. The third is participation in the proposed joint venture of the Kazakh, Afghan, and Turkmen railways associated with the Turgundi-Herat-Kandahar-Spin Boldak alignment, which would distribute risk across three national operators rather than concentrating it on any one [62]. Taken together with the Uzbek measures above, these would give the region two independently demonstrable corridors, one northern and one western, operating under common documentary standards. Two working segments constitute a materially stronger case to financiers and sanctions authorities than a single showcase line, and they insure the regional strategy against the failure of either [238, 395].

Tajikistan: *the longest frontier and the deepest political distance.* Tajikistan presents the sharpest divergence in the region between physical proximity and political willingness. It shares a 1,357-kilometre border with Afghanistan, by a wide margin the longest of any Central Asian state, running largely along the Panj and Amu Darya through the most mountainous terrain of any Afghan frontier. That frontier makes Dushanbe the most directly exposed of the northern neighbours to cross-border security spillover, narcotics trafficking, and displacement. Yet Tajikistan has also remained the most politically distant from the authorities in Kabul, declining the accommodation that Tashkent and Ashgabat pursued after 2021 and positioning itself in sustained opposition on questions of governance and ethnic representation in northern Afghanistan. In the terms of the model, Tajikistan is the clearest regional instance of a

state whose geography would make it a natural corridor participant but whose key, framed around the political composition of the Afghan government rather than around transit or commercial conditions, is the least likely of any regional key to be met.

The corresponding policy implication. The realistic Tajik contribution therefore lies in the electricity domain rather than in transit. As one of the two upstream suppliers in the CASA-1000 arrangement, Tajikistan participates in the only cross-border infrastructure of significance that advanced physically during the study period, and it does so through a governance and payment architecture deliberately designed to function without normalized relations. The analytical point is important: a state can contribute materially to Afghan connectivity while withholding political accommodation entirely, provided the arrangement is ring-fenced. Sustaining and, where hydrological conditions permit, extending seasonal transmission requires no revision of Dushanbe's political position and generates operating data on cross-border metering and payment of precisely the kind that lowers perceived risk for other projects. Any expectation that Tajikistan will function as a transit corridor in the medium term is, on the present evidence, misplaced, and regional planning should not be built upon it.

Kyrgyzstan: the non-contiguous upstream supplier. Kyrgyzstan is the Central Asian state most distant from the Afghan question in every respect but one. It shares no border with Afghanistan, has no territorial exposure to Afghan instability, possesses the smallest economy in the region, and holds no plausible role in any trans-Afghan transit alignment. Its single point of material connection is nonetheless significant: together with Tajikistan it is an upstream supplier under CASA-1000, and therefore a direct participant in the one physical link between Central and South Asia crossing Afghan territory that has progressed toward operation. Kyrgyz involvement is commercial rather than strategic, driven by the value of summer hydropower surplus that would otherwise be spilled, and it is bounded by the seasonality of that surplus and by domestic demand growth that periodically absorbs it.

The corresponding policy implication. Precisely because Kyrgyz participation is commercial and modest, it carries analytical weight disproportionate to its scale. A small, non-contiguous state with no strategic stake in Afghanistan proves willing to enter a cross-border arrangement with it once the payment architecture is ring-fenced and the obligations are seasonal and reversible. That is direct evidence for the dissertation's central claim about what makes participation possible under the lock, namely that the binding constraint is the structure of financial and legal exposure rather than the willingness of regional actors. The appropriate policy expectation is correspondingly bounded: Kyrgyzstan should sustain its transmission commitments and support extension of the CASA-1000 payment template to other sectors, but it is neither a corridor actor nor a source of the financing or political weight that unlocking would require.

The shared Central Asian challenge: sanctions-resilient financing architecture. The single most important structural constraint that all Central Asian states face in pursuing Afghan corridor projects is the absence of a sanctions-resilient financing

mechanism. ADB and AIIB can in principle finance UAP components, but both institutions operate within dollar-clearing systems that create legal and reputational exposure under current U.S. sanctions architecture. The CASA-1000 ring-fenced model, in which World Bank financing is disbursed through an offshore escrow account that bypasses Taliban-ruled Afghanistan treasury entirely, demonstrates that it is possible to design workarounds, but this model is administratively complex, takes years to negotiate, and cannot easily be scaled to a multi-billion-dollar railway project [89, 90, 91]. Central Asian states should collectively advocate, through SCO and CAREC forums, for the creation of a dedicated Central Asia-Afghanistan Connectivity Financing Facility, a multilateral instrument capitalized by regional states and aligned with existing ADB frameworks but structured specifically to provide ring-fenced financing for Afghan-segment infrastructure under compliance regimes acceptable to U.S. OFAC. Expert E3 (Kazakhstan) specifically identified such a financing vehicle as the missing institutional link between current UAP diplomatic momentum and actual construction capacity.

The analytical implication: Central Asian proactivity is necessary but insufficient. The dissertation's geopolitical lock-and-key model confirms that Central Asian corridor diplomacy is necessary, without Uzbek initiative there would be no UAP framework, no trilateral agreement, and no feasibility process, but it is structurally insufficient to unlock integrated connectivity alone. Tashkent and Astana hold important keys: willingness to engage Taliban-ruled Afghanistan, geographic position on the corridor, and institutional relationships with ADB and CAREC. What they cannot provide are the keys held by others: U.S. sanctions relief, Chinese sovereign financing guarantees, or Taliban-ruled Afghanistan institutional reforms. Central Asian states are therefore most effective when they use their position to lower the threshold for these other key-holders, by demonstrating that Afghan connectivity projects are technically viable, financially structured, and diplomatically supported, rather than attempting to substitute for the structural conditions only great powers and Taliban-ruled Afghanistan itself can change.

This insufficiency has a structure worth stating precisely, because it explains why well-designed Central Asian policy has not produced movement. The instruments available to Central Asian states operate on the technical and commercial layer of the problem, namely route selection, customs procedure, gauge standards, freight documentation, and segment financing. The binding constraint operates on the financial and political layer, namely sanctions exposure, the recognition status of the counterparty, and the willingness of major powers to underwrite a corridor that would shift regional balances. Effort applied to the first layer cannot substitute for change on the second, however competent that effort is. This is why the accumulation of memoranda, feasibility studies, and ministerial endorsements over the past five years has produced a highly prepared project that remains unbuilt: the preparation addresses a constraint that was never the binding one.

A second structural feature is a collective-action problem among the Central Asian states themselves. Individually, each has good reason to keep its exposure reversible, since the costs of a stranded investment fall on it alone while the benefits of a

functioning corridor would be shared. The risk-managed engagement documented for both Uzbekistan and Kazakhstan is therefore individually rational. Collectively, however, this caution is self-defeating: it signals to potential financiers that the states closest to the project and best informed about its risks are themselves unwilling to assume irreversible exposure, which is precisely the signal that deters external capital. Reversibility protects each state and reproduces the deadlock for all of them. Recognizing this trade-off explicitly is a precondition for any serious regional strategy.

Two implications follow. The first is that the appropriate Central Asian objective in the medium term is not to unlock the corridor, which is beyond regional capacity, but to lower the threshold at which external key-holders would find unlocking acceptable. That means generating verifiable operational evidence, through the modernization and transparent operation of existing segments such as Hairatan-Mazar-i-Sharif, that trans-Afghan freight can move under auditable customs and payment procedures. Evidence of this kind speaks directly to the compliance concerns that underlie the financial key, in a way that further political endorsement does not. The second is that coordination among Central Asian states would materially change what is possible: a jointly presented corridor position, a shared sanctions-compliance framework developed with international financial institutions, and a common technical standard for gauge and documentation would convert five separate risk-averse positions into one credible counterparty. Existing regional formats provide the venue for this; what has been absent is the decision to use them for a single, narrowly defined purpose rather than for general declarations of intent.

Pakistan, India, and Iran: Moving Beyond Endpoint Rivalry Toward Selective Cooperation

The analysis of Pakistan, India, and Iran in Chapters 2 and 3 reveals that each state occupies a distinct structural position in the geopolitical lock, and each therefore requires a differentiated policy response rather than a generic regional framing. The common thread is that all three states use Afghanistan primarily as a site of relative-gains competition rather than absolute-gains cooperation, but the specific instruments and red lines differ significantly.

For Pakistan, India, and Iran, the findings underline that endpoint rivalry is one of the mechanisms that reinforces the lock. Policies that treat Afghanistan primarily as an extension of port competition or strategic exclusion may preserve short-term leverage, but they also reduce the likelihood that any trans-Afghan corridor becomes stable enough to benefit the wider region [6, 194]. A more productive strategy would involve selective compartmentalization: even without broader geopolitical alignment, actors could permit specific customs, transit, or logistics arrangements to proceed where these do not force immediate resolution of wider rivalries over Gwadar, Karachi, and Chabahar [8, 22, 454].

Pakistan: the most consequential but most constrained actor. Of all regional actors, Pakistan has the greatest immediate leverage over Afghanistan's connectivity. Its control over the Torkham and Chaman border crossings makes it the principal gatekeeper of Afghan trade with the outside world, and its endorsement is essential to any UAP Railway configuration that terminates at Karachi or Gwadar. Yet the

dissertation's process-tracing reveals that Pakistan systematically uses this leverage to extract security concessions from Taliban-ruled Afghanistan, specifically, action against TTP fighters operating from Afghan territory, while simultaneously pursuing a Gwadar-centric corridor architecture that serves Pakistani rather than Afghan interests. The border closures documented in 2023 and 2024 are the clearest empirical expressions of Pakistan's coercive use of transit leverage. Survey respondents R1, R3, and R7 (Pakistan) all acknowledged that border-closure risk remains a near-term contingency but framed it as a consequence of Taliban-ruled Afghanistan inaction on TTP rather than as an independent Pakistani policy choice. The analytical implication for policy is that Pakistan's endpoint rivalry with India over corridor gateways will not disappear, but it can be compartmentalized: specific transit and customs arrangements that do not resolve the Gwadar-Chabahar competition can be permitted to proceed in parallel with it. This compartmentalization logic already operates in the APTTA framework, which permits Afghan-Pakistan trade under defined conditions despite the broader rivalry, and it could be extended to cover UAP-related transit on a similarly bounded basis [8, 194, 454].

Why Pakistan's leverage is self-undermining. The structural difficulty in Pakistan's position is that its principal instrument degrades the asset it is meant to protect. Transit revenue and terminus status depend on predictability, since shippers, insurers, and financiers price a route on the probability that it will be open when needed. Each politically motivated closure of Torkham or Chaman therefore raises the risk premium attached to every alignment terminating in Pakistani ports, including the alignments Islamabad wishes to promote. The leverage is real in the short term and corrosive over the medium term: it extracts concessions from Kabul while simultaneously informing the financiers of the UAP Railway that the southern terminus is not dependable. This is compounded by the fact that the security file which drives the closures, the presence of anti-Pakistan militants on Afghan territory, is not resolvable on the timescale of infrastructure financing, and by Gwadar's own dependence on a financing programme whose pace Islamabad does not control. Pakistan thus holds the most consequential regional key and has the least capacity to turn it in its own favour.

*The corresponding policy implication. I*t follows that the productive request to Pakistan is not that it resolve its dispute with Kabul, which no corridor timetable can accommodate, but that it insulate transit from that dispute. The concrete form would be a bounded transit protocol covering corridor-related freight: published criteria specifying the circumstances in which crossings may be closed, a minimum notice period, and a defined arbitration channel for disputed closures. Such a protocol concedes nothing on the security question and leaves Pakistan's sovereign authority over its frontier intact, but it converts an unpredictable political instrument into a priced commercial one, which is precisely what a financeable corridor requires. The existing transit and trade framework with Afghanistan already demonstrates that bounded arrangements can operate alongside unresolved rivalry, and it provides the natural legal vehicle for extension to UAP-related traffic.

***India**:* leveraging Chabahar without overextending. India's connectivity strategy vis-à-vis Afghanistan is simultaneously its most independent and its most structurally exposed. The Zaranj-Delaram highway, financed by India and still the most concrete Indian infrastructure investment in Afghan territory, provides Afghan exporters with a non-Pakistani route to Chabahar and onward to Indian markets. However, the 2025 U.S. revocation of the Chabahar sanctions waiver demonstrates that India's Chabahar strategy is dependent on U.S. tolerance, not just Iranian and Afghan cooperation [259, 455]. The analytical implication for India is threefold: first, lobby actively for a renewed U.S. Chabahar carve-out, framing it as a counterweight to Chinese BRI influence rather than an Iran-normalization measure; second, expand the Zaranj-Delaram connectivity beyond road transport to include customs facilitation and logistics services that do not require formal Taliban-ruled Afghanistan recognition; third, pursue working-level triangular arrangements with Uzbekistan and Kazakhstan on combined INSTC-Chabahar routing that bypasses the Iran-sanctions bottleneck through Caspian maritime segments. Expert R6 (Afghanistan) noted that Afghan traders view the Chabahar route as qualitatively important even when it is slower or more expensive, because it provides a bargaining alternative to Pakistani border closure.

The structural source of India's exposure. India is the only actor in this analysis whose corridor access can be withdrawn by a state that does not lie on its route. Its alignment runs through Iranian territory and Iranian ports, but its ability to use them depends on the sanctions policy of the United States, and the revocation of the Chabahar waiver demonstrated that this dependence is operative rather than theoretical. New Delhi therefore faces a double exposure that neither Pakistan nor the Central Asian states share: it must sustain a working relationship with Tehran to keep the route physically available, and simultaneously sustain one with Washington to keep it legally available, while the two relationships are in structural tension. Its position is further complicated by political reluctance to engage the authorities in Kabul directly, which limits the operational depth it can develop at the Afghan end of the same corridor it is financing at the Iranian end.

The corresponding policy implication. The strategic response is to broaden the constituency that would lose from a withdrawal of the waiver. A Chabahar developed as a single-country Indian asset can be suspended at the cost of one bilateral relationship; a Chabahar operating as a multi-user facility with Central Asian volumes, Uzbek and Kazakh co-investment in terminal capacity, and published third-party throughput carries a materially higher political cost to suspend, because suspension would then damage states whose cooperation Washington seeks on other files. Framing the facility as a counterweight to a single-corridor regional order, rather than as a measure of Iran normalization, aligns the request with the interests of the state that holds the decisive key. Alongside this, extending Indian engagement from road construction into customs facilitation, warehousing, and logistics services at the Afghan end would deepen the route's operational content without requiring any change in India's formal position on recognition.

Iran: partial facilitator constrained by its own sanctions environment. Iran's role in Afghanistan's connectivity is shaped by two competing dynamics: its geographic position as Afghanistan's primary non-Pakistani maritime outlet via Chabahar, and its own comprehensive sanctions environment that makes Iranian-routed trade legally and financially precarious for third-country firms and banks. The practical implication for Iran is limited but real: Tehran can expand bilateral Afghan-Iranian trade facilitation through its western Afghan border provinces (Herat, Nimroz, Farah), where commercial integration with Iranian markets is already deep, without requiring multilateral frameworks or sanctions changes. For other states, the implication is to treat the Iranian axis as a supplementary hedge rather than a primary corridor, valuable for diversification and for leveraging Pakistani gatekeeping, but not a reliable backbone for large-scale trade given its structural exposure to exogenous shocks [248, 273].

Iran as alternative and as constraint. Iran occupies a position that is analytically distinctive because it is simultaneously the solution to one lock and the source of another. It offers the only maritime outlet for Afghan and Central Asian cargo that does not pass through Pakistani territory, which is what gives the western alignment its strategic value as a hedge against border closure. At the same time, its own sanctions status transmits legal and financial risk to every third party that uses it: shipping lines, insurers, and correspondent banks price Iranian routing according to their exposure to secondary measures, not according to the commercial merits of the route. The consequence is that traffic diverted from a Pakistani lock arrives at an Iranian one. This is why the dissertation treats the Iranian axis as a genuine but capped alternative: it relieves pressure at the margin and preserves bargaining leverage against Pakistani gatekeeping, but it cannot carry the volumes that would make a trans-Afghan corridor economically transformative, because its constraint is of the same type as the constraint it is meant to circumvent.

The corresponding policy implication. For Tehran, the realistic contribution lies in the segment where its capacity is not conditioned by external consent: the deepening of cross-border commercial integration with Herat, Nimroz, and Farah, where trade already functions through informal and non-dollar settlement arrangements that are comparatively insulated from the banking constraint. Formalizing customs procedure and border infrastructure on that axis is achievable unilaterally and improves western Afghanistan's economic position immediately. For other actors, the corresponding implication is one of expectation management: the Iranian route should be resourced as a hedge with an explicit capacity ceiling and planned redundancy, not designated as a backbone whose failure under an exogenous sanctions shock would strand the wider corridor strategy.

Three analytical points follow from this South Asian configuration and should be stated explicitly, because they determine which recommendations are realistic. The first is that endpoint rivalry is a coordination failure rather than a simple conflict of interests. Karachi, Gwadar, and Chabahar are not substitutes competing for a fixed volume of Central Asian cargo; on the demand projections examined in Chapter 3, the volumes that would move under a functioning trans-Afghan corridor exceed what any single gateway could absorb efficiently. Each endpoint state nevertheless behaves as though

the competition were zero-sum, because the value each attaches to being the exclusive gateway is political rather than commercial. The consequence is that all three endpoints remain underused, and the corridor that would fill them remains unbuilt. This is the clearest instance in the dissertation of relative-gains logic producing an outcome that is worse for every participant than the cooperative alternative.

The second point is that the South Asian actors are asymmetrically constrained, which means identical recommendations would not be equally actionable. Pakistan holds the most consequential key, since it controls the southern terminus of the only alignment with a completed feasibility study, yet it is the least able to exercise that key unilaterally: its border management is entangled with an unresolved security dispute with Kabul, and its periodic closure of crossings damages precisely the reliability reputation on which transit revenue depends. India possesses the financial capacity and the Chabahar stake to underwrite an alternative alignment, but is constrained by its exposure to Iran-related secondary sanctions and by a political reluctance to engage the Kabul authorities directly. Iran offers the only alignment that bypasses the Pakistani terminus altogether, but its own sanctions environment deters the shipping lines, insurers, and banks whose participation would make that route commercially usable. Each state therefore holds a partial solution to the constraint that binds another, and none can act on it alone.

The third point concerns sequencing. Because these constraints are interlocking, the realistic policy path for South Asian actors is not a comprehensive settlement but a set of narrow, verifiable steps that reduce the political value of exclusivity. Predictable border-crossing regimes with published closure criteria would convert Pakistani control from a political instrument into a commercial asset without requiring any concession on the underlying security dispute. Reciprocal transit guarantees covering Afghan goods moving to Indian markets, and Indian goods moving to Central Asia, would establish that participation in one corridor does not foreclose participation in another. Technical cooperation on customs interoperability among the three endpoints, conducted at working level and without political framing, would lower the cost of eventual convergence while committing no state to a preferred alignment. None of these steps requires recognition, and none requires any endpoint state to abandon its own gateway ambitions; that is precisely why they are feasible under the lock, and why they are the appropriate object of policy in the medium term.

A further consideration bears on both regions simultaneously. If Afghanistan were drawn more firmly into the China-Pakistan Economic Corridor, trade would be pulled southward under an architecture that Central Asian states do not shape and in which Uzbek and Kazakh leverage would diminish considerably. Such a development would not unlock the corridor in the sense used in this dissertation; it would substitute one bilateral dependency for another and would consolidate rather than dissolve the lock, since the alignment would remain conditional on a single external patron and would leave the financial key untouched. For Central Asian policymakers this is the strongest practical argument against indefinite deferral: the option value of trans-Afghan connectivity is not constant over time, and corridor geometry set by others is difficult to renegotiate afterwards.

Taliban-ruled Afghanistan, the United States, Russia, China, and International Financial Institutions

The five actors addressed in this sub-section, Taliban-ruled Afghanistan, the United States and its Western partners, Russia, China, and international financial institutions, collectively hold the most powerful keys in the geopolitical lock-and-key system. Their positions are not symmetric: Taliban-ruled Afghanistan holds the proximate gatekeeping position but lacks financial access; the United States controls the primary financial sanctions instrument; China holds the largest bilateral investment key; and international financial institutions provide the multilateral financing architecture without which large-scale corridor projects cannot proceed. Policy recommendations for each actor therefore address the specific structural role they play in the lock, not generic good governance or cooperation advice.

Taliban-ruled Afghanistan: from maximalist demands to sequenced credibility-building. The dissertation's empirical analysis establishes that Taliban-ruled Afghanistan's connectivity strategy is structurally caught between two incompatible time horizons. In the long run, the regime's stated objective, full international recognition, comprehensive sanctions relief, and access to multilateral development finance, is the only configuration that would allow it to become the transit hub its official statements describe. In the short and medium run, none of these conditions are achievable as a package; the U.S., EU, and UN positions on recognition and sanctions are explicitly linked to governance benchmarks Taliban-ruled Afghanistan has not met and, given internal factional dynamics, is unlikely to meet comprehensively in the near term [20, 21, 184]. The policy implication is not that Taliban-ruled Afghanistan should abandon its long-term objectives, but that it should invest more deliberately in the intermediate-level credibility that changes external risk calculations for the actors it can reach, principally China, Uzbekistan, Pakistan, and Gulf financial intermediaries, without requiring U.S. or EU endorsement.

The three-step sequence, Hairatan customs reform, standardized Mes Aynak contract terms, and named-commander security guarantees, should be understood not as isolated administrative improvements but as a coherent signalling strategy. Each step addresses a specific key held by a specific actor: Hairatan customs reform speaks to Uzbekistan's concern about predictable transit conditions; the Mes Aynak contract framework speaks to MCC and Chinese state-backed insurers who have explicitly identified contractual opacity as a primary obstacle to capital deployment; and the security guarantee structure speaks to Beijing's post-2021 demand for personal-accountability mechanisms that move beyond generic Taliban pledges [227]. Afghan MoFA officials A2 and A3 acknowledged in their interviews that Chinese investors had raised all three concerns directly in bilateral discussions, and that Taliban-ruled Afghanistan had not yet produced a coherent response package.

Beyond these three steps, the dissertation's analysis of Taliban-ruled Afghanistan internal factionalism identifies a structural governance constraint that the regime must address if it is to improve its reliability as a corridor partner. The bifurcation between the Kandahar ideological core, which retains ultimate authority over strategic and ideological questions, and the Kabul executive tier, which manages day-to-day

economic negotiations, creates a persistent credibility deficit. Survey respondents R5 and R9 (Afghanistan) specifically identified this factional unpredictability as a more important obstacle than sanctions per se, noting that several promising investment discussions had collapsed not because of legal or financial barriers but because Taliban-ruled Afghanistan positions shifted mid-negotiation as Kandahar intervened. The institutional implication is that Taliban-ruled Afghanistan needs to establish a visible, durable, cross-factional decision-making channel for economic governance, whether through a formally empowered Ministry of Economy, a recognized investment promotion body, or a Sino-Taliban joint facilitation committee, whose decisions carry cross-factional authority [184].

The analytical implication: credibility is the only key Kabul holds. Set against the other actors examined here, the authorities in Kabul are distinctive in holding a key that is necessary but not sufficient, and in holding no other. They can grant or withhold territorial access, permits, and site security, and no project proceeds without that consent. They cannot supply financing, cannot lift sanctions, and cannot compel any external party to participate. The single variable genuinely within their control is therefore the verifiability of their own commitments, and this is precisely the variable on which external assessments are most sceptical. The implication is that maximalist sequencing, in which recognition and sanctions relief are demanded before operational concessions are offered, inverts the only order that could work. Credibility instruments that are measurable and independently auditable, published customs schedules, contract terms that survive changes of personnel, and security guarantees attached to named commanders with verifiable performance, cost little in ideological terms and address directly the risk assessments that currently deter capital. The gatekeeper's bargaining position improves not by asserting sovereignty more loudly but by making its undertakings checkable.

The United States: reorienting sanctions from punishment to leverage. The dissertation's findings place the United States in an analytically unusual position: it is simultaneously the actor with the greatest capacity to change the structural conditions around Afghanistan's connectivity, and the actor least likely to exercise that capacity in a way that produces integrated, multilateral corridor development. U.S. sanctions architecture, comprising OFAC asset designations, executive orders, and the secondary sanctions threat, functions as the primary financial lock, raising compliance costs and legal exposure for every bank, insurer, construction firm, and development institution that might otherwise engage with Afghan-segment infrastructure projects. The dissertation has shown that this financial lock operates independently of whether Taliban-ruled Afghanistan itself is willing to cooperate on a given project: even fully bilateral Sino-Afghan arrangements at Mes Aynak are constrained because MCC uses dollar-clearing channels, employs internationally listed equipment suppliers, and requires export credit insurance from institutions subject to U.S. secondary sanctions pressure [20, 21, 133]. The policy implication for Washington is not a general relaxation of the sanctions framework, which serves legitimate counterterrorism and normative objectives, but a strategic reconfiguration from punitive blanket exclusion toward conditional, targeted leverage.

A more effective strategy would involve the issuance of OFAC project-level carve-outs modelled on the Chabahar precedent, linked to specific, verifiable, and time-bound benchmarks. Two such carve-outs are analytically most defensible based on the dissertation's evidence. First, a UAP Railway Afghan-segment carve-out, specifically covering construction-related transactions by named ADB, AIIB, or multilateral contractors, linked to Taliban-ruled Afghanistan compliance with CAREC customs standards and verified through a third-party monitoring arrangement like that used in CASA-1000. Second, a Mes Aynak copper extraction carve-out covering ring-fenced MCC payment channels, linked to verifiable Taliban counterterrorism cooperation on ISKP in Logar Province and to Taliban-ruled Afghanistan's adoption of internationally audited royalty accounting. Expert interview E1 identified project-level OFAC carve-outs as the single most important policy change that would alter the connectivity landscape, and survey respondents R8, R11, and R12 (Afghanistan) all ranked U.S. sanctions as the primary external constraint on economic development, above security conditions and governance deficits.

The strategic rationale for this approach is not altruistic but realist. Under current blanket sanctions, the United States has effectively surrendered the ability to shape the geometry of Afghan corridor development to China and Gulf actors who are willing to operate in the grey zones of sanctions compliance. A conditional, project-level engagement strategy would allow Washington to set the terms under which connectivity proceeds, counterterrorism cooperation, accounting transparency, exclusion of designated entities, rather than simply observing China and Uzbekistan define those terms bilaterally. The CASA-1000 ring-fenced model demonstrates that this approach is institutionally feasible without constituting formal Taliban-ruled Afghanistan recognition or political normalization [89, 90, 91].

The analytical implication: the decisive key and the cost of holding it closed. The dissertation's model assigns the United States a position that no other actor occupies: a single calibrated adjustment on the financial key would alter the incentive structure of every other participant simultaneously, because it is the sanctions exposure of intermediaries rather than the preferences of regional states that currently prevents financial close. This asymmetry defines both the leverage and its cost. Holding the key closed does not preserve American influence over Afghan connectivity; it transfers the shaping of that connectivity to actors more tolerant of compliance ambiguity, and it does so without extracting the counterterrorism or governance concessions that conditionality could purchase. A project-level carve-out, narrowly drawn, time-limited, tied to verifiable performance, and revocable, would keep the key in American hands while converting it from a static prohibition into an instrument of influence. The precedent design matters as much as the decision itself: a carve-out structured as a replicable template establishes the terms on which future projects proceed, whereas an ad hoc exception establishes only that exceptions are possible.

Russia: from rival-corridor promotion to non-obstruction. Russia's structural position differs from that of the United States and China: it holds fewer direct keys over the specific UAP and Mes Aynak cases, but it shapes the environment through its promotion of the INSTC as a competing north–south geometry, its CSTO-anchored

security role, the Moscow Format, and its early diplomatic engagement with Taliban-ruled Afghanistan. The dissertation's evidence indicates that Moscow's most consequential influence on trans-Afghan connectivity is not what it can build but what it can frame and obstruct: presenting the INSTC as the "reliable" alternative to Afghan routes reinforces the relative-gains framing that reinforces the lock. The realistic policy implication is therefore compartmentalization rather than partnership. Russia gains little from actively spoiling a UAP corridor that primarily serves Uzbek and Afghan interests, and it could treat the INSTC and a trans-Afghan route as complementary rather than rival geometries. The threshold-lowering move available to Moscow is restraint plus security cooperation through existing regional formats, declining to promote alternative routes as substitutes and supporting counter-terrorism coordination that reduces the security discount applied to Afghan-segment infrastructure, neither of which requires it to finance or endorse the corridor directly.

The structural character of Russian influence. Russia's position in this configuration is distinctive because its key is essentially negative. Moscow cannot build the trans-Afghan corridor, cannot finance it under present conditions, and holds no terminus on it. What it can do is shape the environment in which others evaluate it, principally by promoting the International North-South Transport Corridor as the authoritative north-south geometry and by framing trans-Afghan alignments as speculative alternatives to an established route. That framing has disproportionate effect because it is directed at exactly the audience whose confidence the project requires: financiers and freight operators deciding where to commit capacity. Russia's influence therefore operates through expectations rather than through material capability, which is why the model treats it as an environmental rather than a proximate constraint.

The corresponding policy implication. Because the influence is expectational, the relevant request to Moscow is correspondingly modest: not support, which is unlikely and unnecessary, but non-obstruction. The two corridors are not in fact substitutes, since they serve different latitudes, different commodity mixes, and partly different markets, and a public Russian acknowledgement of complementarity would remove a systemic veto at almost no cost to Russian interests. There is also a positive-sum element that has been underused: Russian freight would itself benefit from a functioning southern outlet, and Russian participation in feasibility and rolling-stock discussions would convert an actor with an incentive to disparage the project into one with an interest in its viability. Continued security cooperation through existing regional formats supplies a channel for this that requires no change in Moscow's formal posture toward Kabul.

China: from strategic patience to structured commitment. China's approach to Afghanistan since 2021 has been characterized by what analysts have called strategic patience, maintaining diplomatic presence, conducting bilateral talks, participating in symbolic ceremonies, and preserving optionality without committing to the large-scale capital deployment that Mes Aynak and UAP would require [133, 246]. The dissertation's analysis confirms this characterization and traces its structural logic: Beijing faces secondary sanctions exposure, ISKP security threats to Chinese nationals,

contractual uncertainty in a non-recognized jurisdiction, and ESG reputational risks associated with mining in a regime that has banned girls from secondary education, each of which constitutes a rational deterrent to large-scale commitment. Expert E2 described Beijing's posture as deliberately ambiguous: China wants the resource access and the geopolitical proximity that a functional Mes Aynak operation would provide but does not want the reputational and financial exposure of being the sole sovereign guarantor of a failed investment in Taliban-controlled territory.

The policy implication for China is a shift from bilateral ambiguity to multilateral risk distribution. If Beijing were to structure its Mes Aynak engagement through a jointly capitalized special-purpose vehicle (SPV) that includes Gulf sovereign wealth funds, particularly the UAE and Qatar, which have already demonstrated willingness to serve as financial intermediaries for Afghan transactions, and insures through a non-dollar clearing mechanism such as the CIPS cross-border payment system, it could simultaneously reduce its own direct sanctions exposure and distribute the reputational risk across a broader investor coalition. For the UAP Railway, Chinese engagement could take the form of providing sovereign credit guarantees through the Asian Infrastructure Investment Bank (AIIB) for the Afghan segment, which Beijing controls as the AIIB's largest shareholder, structured under the same ring-fenced escrow design used for CASA-1000. Survey respondents R5, R9, and R11 (Afghanistan) expressed cautious optimism that a Sino-Afghan structured deal was achievable at Mes Aynak within five years if security in Logar Province remained manageable, and expert E2 identified an AIIB-backed UAP financing mechanism as technically feasible if the political will existed in Beijing [133, 227].

The analytical implication: China as the swing actor. China's strategic patience is not indecision but a rational response to the lock as it stands: with secondary sanctions exposure unresolved, security guarantees unverifiable, and the recognition question open, deferral preserves optionality at negligible cost while the underlying assets remain in place. This makes Beijing the swing actor between two of the three scenarios. If the financial key is adjusted and credible security arrangements emerge, China possesses the capital, the construction capacity, and the shareholding position in regional development institutions to move rapidly to commitment, and partial unlocking becomes possible. If neither changes, Chinese patience is indefinitely sustainable and managed dissociation is reinforced, since narrow bilateral arrangements deliver Beijing enough to justify presence without requiring exposure. The corollary for other actors is that Chinese commitment is a dependent rather than an independent variable: it will follow a change in the sanctions environment and cannot substitute for one, and policies premised on persuading Beijing to move first misread the sequence.

International financial institutions: from project design to system architecture. International financial institutions possess both the financial resources and the technical competence to underwrite major corridor projects, yet they operate within legal and governance frameworks that make direct engagement with Taliban-ruled Afghanistan legally precarious and institutionally controversial. The ADB, World Bank, and AIIB have all navigated this constraint in different ways since 2021, the

World Bank through the CASA-1000 ring-fenced escrow architecture, the ADB through CAREC corridor assessment work that does not require Taliban-ruled Afghanistan contractual participation, and the AIIB through careful abstention from Afghan-specific operations [23, 89, 90]. The dissertation's analysis suggests that this differentiated approach is not merely an ad hoc response to crisis but a model that could be systematically scaled to support the managed dissociation equilibrium that represents Afghanistan's most plausible near-term connectivity trajectory.

The key analytical insight from the CASA-1000 case is that ring-fenced architecture separates the question of whether connectivity proceeds from the question of whether Taliban-ruled Afghanistan is recognized, rewarded, or normalized. By routing all project payments through an offshore escrow account, disbursing directly to contractors rather than to the Afghan treasury, and establishing an independent compliance monitor, the World Bank enabled construction to resume without validating Taliban-ruled Afghanistan’s governance model or triggering the political controversies that formal engagement would have provoked [89, 90, 91]. Three design principles emerge from the CASA-1000 experience that should be standardized across Afghan-segment IFI operations: first, all contractor payments and project revenues must flow through a designated offshore escrow vehicle with disbursement instructions held by an independent trustee; second, compliance monitoring must be conducted by an internationally recognized third-party organization; and third, project scope must be explicitly defined and technically bounded to minimize the risk of function creep.

Beyond individual project design, international financial institutions should collectively engage in what this dissertation terms system architecture, the deliberate construction of the multilateral financial plumbing that makes Afghan-segment connectivity bankable at scale. This means three specific institutional investments. First, jointly developing an Afghanistan Connectivity Compliance Framework (ACCF), a standardized set of escrow, monitoring, and disbursement protocols that any IFI can adopt for Afghan-segment operations, reducing the transaction cost of ring-fenced project design from a multi-year legal process to a replicable template. Second, establishing a joint IFI risk-sharing facility for Afghan infrastructure modelled on the MIGA guarantee framework, distributing the political and security risk of Afghan-segment construction across multiple institutional balance sheets. Third, systematically publishing the legal analysis of how OFAC general licence structures interact with IFI governance frameworks, reducing the compliance ambiguity that currently causes individual IFI boards to reflexively decline Afghan operations regardless of their ring-fenced design [23, 89, 90].

The analytical implication: institutions as the conversion mechanism. The distinctive contribution of the international financial institutions is that they are the mechanism through which a political change becomes an operational one, and the speed of that conversion is itself a policy variable. If a sanctions adjustment were to occur without prepared instruments, the interval between the political decision and the first disbursement would be measured in years of legal drafting, escrow negotiation, and compliance design, during which the political opening could close. If standardized templates, agreed escrow and monitoring protocols, and pre-cleared legal opinions

were already in place, the same interval would be measured in months. Preparing that architecture requires no change in the recognition status of any counterparty and no disbursement of funds, which is precisely why it is achievable now. The institutions can therefore do something no other actor can: reduce the cost of acting on a favourable change before that change occurs, and thereby make the change itself more attractive to the actor considering it.

Table 4.1. Synthesis of actor-specific recommendations under the geopolitical lock

Actor	Key it holds	Recommended move	Threshold it lowers
Kazakhstan	Political space; CAREC/UNECE role; Middle Corridor hub	Push gauge-standard harmonization; targeted customs facilitation with Taliban-ruled Afghanistan; working-level engagement	Makes gauge planning bankable; sets commercial precedents
Uzbekistan	Corridor initiative; geography; ADB/CAREC ties	Corridor realism: Hairatan modernization, TIR customs harmonization, digitized freight docs alongside UAP advocacy	Demonstrates viability; pressures financing and sanctions key-holders
Turkmenistan	804-km Afghan border; Serhetabat-Torghundi rail; neutrality; Lapis Lazuli framework	Complete Turgundi-Herat (173 km); metered electricity exports; join the tri-national railway venture	Adds a second demonstrable corridor independent of the Pakistani terminus
Tajikistan	Longest Afghan frontier (1,357 km); CASA-1000 upstream supply	Sustain and extend ring-fenced seasonal transmission; no transit role assumed	Generates cross-border metering and payment data without political accommodation
Kyrgyzstan	CASA-1000 upstream supply; summer hydropower surplus	Sustain transmission commitments; support extension of the CASA-1000 payment template	Demonstrates that ring-fenced architecture, not willingness, is the binding constraint
Central Asia (collective)	Regional convening (SCO, CAREC)	Advocate a ring-fenced, OFAC-compatible Central Asia–Afghanistan Connectivity Financing Facility	Supplies the missing vehicle between diplomacy and construction
Pakistan	Torkham/Chaman crossings; Karachi/Gwadar endpoint	Selective compartmentalization: permit UAP-related transit on bounded, APTTA-style terms	De-links transit from resolving endpoint rivalry
India	Chabahar / Zaranj–Delaram route	Seek a renewed US Chabahar carve-out; extend Zaranj–Delaram; triangular INSTC–Chabahar routing	Keeps a non-Pakistani route alive as a bargaining alternative
Iran	Chabahar outlet; western-border integration	Expand border-province trade facilitation as a supplementary hedge	Marginal diversification; pressure-relief on Pakistani gatekeeping

Taliban-ruled Afghanistan	Territorial control; permits; site security	Sequenced credibility-building (Hairatan reform; standardized Mes Aynak terms; named-commander guarantees)	Shifts risk calculus for China, Uzbekistan, Gulf intermediaries without Western endorsement
United States	OFAC sanctions; dollar system; IFI influence	Conditional, project-level OFAC carve-outs (Chabahar precedent), tied to verifiable CT/accounting benchmarks	Makes IFI/contractor participation and Chinese financing legally feasible
Russia	INSTC promotion; CSTO role; Moscow Format	Compartmentalize INSTC vs. UAP; non-obstruction plus CT cooperation	Removes one systemic veto; weakens the rival-corridor framing
China	Investment capacity; AIIB's largest shareholder	Multilateral risk distribution: SPV with Gulf SWFs + CIPS for Mes Aynak; AIIB guarantee for the UAP Afghan segment	Reduces sanctions/reputational exposure; unlocks Mes Aynak and UAP bankability
IFIs (ADB/WB/AIIB)	Financing; technical capacity; ring-fencing know-how	Standardize ring-fenced templates (the ACCF); joint risk-sharing facility; publish OFAC/IFI legal analysis	Cuts transaction cost/time of project-level engagement to a replicable template

This chapter has pursued four connected analytical tasks. It first established the general analytical picture of Afghanistan's position between Central Asia and South Asia and distinguished four approaches to unlocking that connectivity, showing that the functional and bilateral approaches sustain the present equilibrium, that the multilateral approach prepares the ground, and that only a calibrated political adjustment reaches the binding constraint. It then projected the evidence forward into three scenarios, each with its own causal logic, indicator signature, and falsification conditions. It next translated the structural findings into differentiated recommendations for the actors concerned. Finally, it returned to the geopolitical lock-and-key model itself and assessed its explanatory reach against the combined evidence of the two cases and against the principal alternative explanations.

The cross-case analysis confirms that all three corollaries of the central hypothesis receive substantial empirical support. The UAP Railway demonstrates that great-power deadlock (Corollary 1) operates not through direct military confrontation but through the deployment of financial sanctions, alternative route promotion, risk inflation, and diplomatic hesitation as instruments of competitive statecraft, mechanisms that are individually deniable but collectively decisive in preventing corridor implementation. Mes Aynak demonstrates that Taliban-ruled Afghanistan's gatekeeper agency (Corollary 2) is real in the sense of enabling bilateral bargaining and symbolic activation but bounded in the sense that it cannot supply the full bundle of financial, legal, and security assurances that large-scale extractive investment requires under a comprehensive sanctions regime. And the cross-case pattern, reinforced by the supplementary evidence from CASA-1000, TAPI, and Lapis Lazuli, confirms that managed dissociation (Corollary 3) is not a transitional stage toward integration but a stable, intended equilibrium that serves the interests of external actors who benefit from

preserving selective access to Afghan geography while preventing any rival from consolidating strategic advantage through it [8, 20, 25].

The scenario analysis section established that among the three futures available to Afghanistan's connectivity, sustained deadlock, managed dissociation, and partial unlocking, the second is structurally most probable in the medium term. This assessment is not defeatist; it is analytically precise. Managed dissociation is probable because it represents the stable intersection of all major actors' revealed preferences: the United States prefers selective exclusion over either full engagement or total isolation; China prefers tactical foothold over full commitment; Central Asian states prefer incremental bilateral gains over a multilateral corridor that exposes them to sanctions risk; and Taliban-ruled Afghanistan prefers any revenue-generating arrangement over continued economic isolation, even if it falls far short of the transformative corridor narrative in official discourse. The partial-unlocking scenario, while less probable, is analytically important because it identifies the specific trigger conditions, a U.S. OFAC project carve-out, a Chinese sovereign financing guarantee, or a Central Asian normalization step, that would alter the equilibrium. Understanding these triggers is essential for policy actors who wish to move beyond the managed dissociation ceiling.

The policy implications section translated these structural findings into differentiated, actor-specific recommendations, treating each actor in three analytical moves: the structural source of its position, the constraint or dilemma that limits what it can achieve, and the specific measure that follows. All five Central Asian states are addressed, beginning with Kazakhstan, whose leverage is institutional and legal-diplomatic rather than territorial, and continuing through Uzbekistan as the pivotal actor by virtue of border contiguity, an operating cross-border railway, a dominant electricity supply position, and the initiating role in the only ratified corridor framework; Turkmenistan, whose neutrality and westward orientation supply an alternative axis; Tajikistan, which holds the longest Afghan frontier but the least attainable key; and Kyrgyzstan, whose modest and purely commercial participation demonstrates that ring-fenced architecture rather than regional willingness is the binding constraint. For the South Asian states, endpoint rivalry is identified as a coordination failure that can be compartmentalized rather than resolved. For the external actors, the analysis distinguishes the decisive financial key held by the United States, the essentially negative key held by Russia, China's position as the swing actor between deadlock and partial unlocking, and the role of the international financial institutions as the mechanism that converts a political change into an operational one. The recommendations are summarized in Table 4.1.

Taken together, these recommendations share a common analytical logic that the dissertation's geopolitical lock-and-key model makes explicit: progress on Afghanistan's connectivity does not require the simultaneous resolution of all geopolitical conflicts, but it does require deliberate, sequenced changes in the specific key-holding positions of the actors who currently maintain the lock. No single actor can unlock the system alone. Taliban-ruled Afghanistan cannot compel sanctions relief; the United States cannot compel Chinese investment; China cannot compel Taliban-

ruled Afghanistan governance reform; and Central Asian states cannot substitute for the multilateral financing that only IFIs and great-power guarantees can provide. But each actor can lower the threshold that makes the next actor's move more feasible, and identifying those threshold-lowering steps is precisely what an analytically serious policy framework, grounded in the structural logic of the lock, can provide. This is the practical payoff of the dissertation's theoretical investment: not a roadmap to a predetermined destination, but a structured diagnostic that shows which levers, if pulled, would produce which changes in which parts of the system. A realistic reading must also acknowledge the tension this creates: the same relative-gains logic that produces the lock makes each recommended move costly for the actor best placed to take it, Washington has little unilateral incentive to relax a financial lock that already serves its strategic-exclusion preference, just as Beijing benefits from optionality without commitment. These recommendations should therefore be read not as predictions of what actors will do, but as a map of the specific threshold-lowering steps that could shift the equilibrium if an actor’s cost-benefit calculus changes, which is precisely what the partial-unlocking scenario in §4.2 specifies.

The Conclusion that follows draws together the dissertation's theoretical contributions, restates its empirical findings across the full arc of the study, and situates the geopolitical lock-and-key model within the broader trajectory of International Relations scholarship on connectivity, contested sovereignty, and infrastructure statecraft. It also reflects on the limitations of the study and identifies the most productive directions for future comparative research that would test whether the model's insights travel beyond the Afghan case to other contested corridors and sanctioned jurisdictions where the interaction of geopolitical rivalry and sovereign gatekeeping shapes connectivity outcomes.

4.4 Cross-Case Analysis: The Explanatory Reach of the Geopolitical Lock-and-Key Model

The Geopolitical Lock Confirmed: Answering the Research Question

This synthesis does not restate the case narratives of Chapter 3; its task is to evaluate how far the combined evidence supports the geopolitical lock-and-key model in comparison with alternative explanations, and to establish which end-state, unlocking, isolation, or managed dissociation, best fits the observed record.

This dissertation asked how the interplay of great-power rivalry, regional competition, and Taliban-ruled Afghanistan as sovereign gatekeeper sustain a geopolitical lock on Afghanistan's connectivity between Central Asia and South Asia, and what these reveals about the country's prospects for transformation into a functional corridor. The combined evidence from UAP and Mes Aynak indicates that the lock is sustained through the interaction of three reinforcing mechanisms: systemic rivalry among major powers, regional competition over routes and gateways, and bounded gatekeeper agency under sanctions and non-recognition [8, 20, 21].

First, systemic rivalry among the United States, China, and Russia prevents convergence on a shared corridor architecture through Afghanistan. The UAP case demonstrates that even where economic feasibility and regional demand are strong, integrated transit corridors become politically difficult once they are perceived as

instruments that could shift relative influence toward a rival actor, whether through BRI/CPEC expansion, Russian Eurasian routing, or alternative U.S.-preferred geometries [7, 22, 23]. Under these conditions, sanctions, alternative route promotion, financing hesitation, and diplomatic caution operate not as incidental obstacles, but as active tools that preserve strategic ambiguity and delay implementation [20, 21].

Second, regional competition reinforces rather than mitigates this systemic deadlock. Pakistan, India, and Iran do not merely provide alternative endpoints; they embed Afghanistan's corridor politics in wider contests over ports, transit leverage, and regional hierarchy, most visibly through the Karachi/Gwadar versus Chabahar dilemma and through recurrent customs, border, and security frictions that undermine unified routing [6, 194, 454]. As a result, Afghanistan's connectivity options are repeatedly fragmented into competing, politically loaded alignments rather than integrated into a shared North-South regional system [8, 22].

Third, Taliban-ruled Afghanistan does possess agency, but that agency is sharply bounded. Mes Aynak shows that the Taliban can bargain, provide site-level assurances, relaunch negotiations, and attempt to convert territorial control into revenue and incremental legitimacy, yet it cannot by itself restore banking confidence, neutralize sanctions exposure, or provide the full bundle of legal, security, and reputational guarantees required for multibillion-dollar investment [24]. In this sense, Taliban-ruled Afghanistan acts as a sovereign gatekeeper but not as a sovereign unlocker: it can shape access to projects and extract selective bargains, but it cannot dissolve the wider lock that conditions all major forms of trans-Afghan integration [183, 184, 186].

The core research question can therefore be answered as follows: Afghanistan's connectivity remains unrealized because the conditions required for unlocking are distributed across rival actors whose demanded keys are mutually incompatible, while the territorial gatekeeper itself lacks the recognition, financial access, and institutional credibility needed to reconcile them. The resulting pattern is not one of universal paralysis, but of structured fragmentation in which narrow bilateral or sectoral arrangements may proceed partially, while integrated, multiactor corridor development remains systematically constrained [20, 21, 26].

Testing the Hypothesis and Corollaries Against the Evidence

The dissertation's central hypothesis receives strong support from the evidence. Afghanistan's connectivity is not blocked primarily by technical infeasibility or by the absence of economic rationale, but by the fact that integrated corridors would redistribute strategic influence in ways rival actors seek to prevent, prompting them to rely on sanctions, route competition, risk inflation, and financing barriers rather than permit a rival-favouring outcome [12, 13, 23].

Corollary 1: Great Power Deadlock is strongly confirmed by the UAP Railway case. UAP is a most-likely case for cooperative integration under liberal-functionalist expectations because it is economically attractive, repeatedly endorsed by participating states, and supported by feasibility work and diplomatic signalling; yet it remains unbuilt on Afghan territory because implementation depends on the alignment of rival corridor visions and sanction-compatible finance that have not materialized [22, 23,

65]. The project demonstrates how relative-gains concerns convert an apparently mutual-benefit corridor into an arena of strategic denial.

Corollary 2: Gatekeeper's Constrained Agency is strongly confirmed by the Mes Aynak case. The project combines a major investor, a high-value resource, and an Taliban-ruled Afghanistan leadership eager for revenue and visible economic success yet still fails to move from symbolic relaunch to sustained extraction because external financial and legal constraints remain unresolved and because Taliban-ruled Afghanistan cannot supply all the assurances demanded by global investors and financial intermediaries [133]. Mes Aynak therefore shows that even where actor complexity is reduced, gatekeeper leverage remains insufficient to overcome a structural lock anchored in sanctions, non-recognition, and de-risking [24, 140, 193].

Corollary 3: Managed Dissociation as Equilibrium also receives substantial support. Neither UAP nor Mes Aynak has produced integrated unlocking, but neither reflects total isolation; instead, both cases generate negotiations, memoranda, symbolic activation, and narrow forms of engagement that remain partial, reversible, and disconnected from a broader regional governance framework [23, 25]. This is precisely the pattern theorized in Chapter 1 as managed dissociation: selective, fragmented connectivity that permits bounded gains for specific actors while preserving Afghanistan's exclusion from a coherent corridor order [20, 21, 26].

Weighing the Model Against Alternative Explanations

Confirmation of the hypothesis and corollaries is only as strong as the elimination of rivals. Four families of alternative explanation were carried through the empirical chapters as competing hypotheses, and their systematic assessment is the task of this subsection: domestic-institutional accounts (governance weakness, corruption, administrative incapacity); commercial-feasibility accounts (project economics, cargo base, investor risk calculations); security-centred accounts; and, at Mes Aynak specifically, heritage and technical constraints.

Domestic-institutional accounts predict that connectivity should advance wherever Afghan institutional involvement is minimized and stall wherever it is required. The record contradicts the first half of that prediction: even fully ring-fenced designs that deliberately bypass Taliban-ruled Afghanistan institutions, most prominently CASA-1000’s offshore-account structure, proceed only in narrow, heavily conditioned forms, while projects requiring sanctions-compatible finance stall regardless of the administrative arrangement. Institutional weakness is real and raises transaction costs, but it is incorporated in the model as a component of bounded gatekeeper agency rather than standing as an independent, sufficient cause.

Commercial-feasibility accounts fail against the same discriminating evidence in both cases: positive multilateral feasibility assessments, sustained state commitment, and repeated relaunches are not the behavioural signature of commercially hopeless undertakings, and financiers documented objections concern sanctions exposure and legal enforceability rather than traffic or price risk. Security-centred accounts confront the post-2021 pattern directly: territory-wide security improved markedly, the gatekeeper offered site-level guarantees, and preparatory access resumed at Mes Aynak, yet financing behaviour did not shift, because financial and legal locks did not.

At the theoretical level, the model was also weighed against the interpretation of Afghanistan as a space of competing connectivity regimes, in which actors do not simply block development but promote rival models of engagement. The evidence supports a bounded version of this reading, and the model accommodates it: the coexistence of cooperation and rivalry is precisely what managed dissociation describes, narrow, actor-specific bargains proceeding beneath a systemic lock, and the lock-and-key framework is therefore not a binary open-closed scheme but a continuum whose intermediate equilibrium the competing-regimes intuition captures in part. What the competing-regimes reading understates, and what the evidence repeatedly displays, is the systematic asymmetry between the ease with which symbolic and preparatory stages advance and the consistency with which the finance-and-recognition stage fails across otherwise dissimilar projects, sectors, and actor constellations.

The comparative verdict is therefore not that alternative factors are absent, but that they are subordinate and interacting: each raises the cost of unlocking, none relocates the binding failure point. The geopolitical lock, expressed through mutually incompatible keys and enforced through sanctions-shaped financial and legal channels, is the constraint whose removal is necessary for unlocking; removing the others without it demonstrably does not suffice. On the L-, K-, and G-indicators specified in Section 1.4, the observed record matches the model's predictions across both cases and the supplementary corridor snapshots of Section 3.4.

Theoretical Contributions: Beyond Liberal Functionalism

The findings carry three main theoretical implications. First, they challenge liberal-functionalist expectations that technical feasibility and shared economic interests will gradually override political conflict in high-stakes corridor spaces [12, 14]. In Afghanistan, the higher the strategic value of a route or project, the more intensely rival actors seek to shape, delay, or redirect it, confirming realist and geoeconomic arguments that infrastructure in contested regions must be understood as an instrument of power rather than as a neutral development good [20, 30, 181].

Second, the dissertation refines the concept of the sovereign gatekeeper. Taliban-ruled Afghanistan is neither a passive victim of external constraint nor a fully autonomous architect of Afghanistan's connectivity future. Rather, it exercises meaningful control over territory, permitting, border management, and site security, but its capacity to translate that control into full corridor participation or large-scale economic integration is bounded by non-recognition, sanctions, ideological rigidity, and the preferences of external lock-holders [114].

Third, the chapter strengthens the analytical value of managed dissociation as a category between comprehensive connectivity and isolation. The Afghan case demonstrates that fragmented, sector-specific, and ring-fenced engagement may be a stable intended outcome of rivalry rather than a temporary or accidental stage on the road to fuller integration. In this respect, the concept has wider relevance for other contested connectivity spaces where external actors seek to preserve selective access while preventing the emergence of politically transformative interdependence [8, 27, 116].

CONCLUSION

This dissertation set out to explain why Afghanistan's widely acknowledged connectivity potential between Central Asia and South Asia remains unrealized despite clear geographic and economic incentives, repeated policy initiatives, and decades of international engagement. The central argument, developed across four chapters and tested through two theory-guided case studies, the UAP Railway and the Mes Aynak copper project, holds that Afghanistan's disconnection is not a residual by-product of underdevelopment or domestic fragility but the sustained outcome of a geopolitical lock produced by great-power rivalry, regional competition, and the constrained agency of Taliban-ruled Afghanistan as a sovereign gatekeeper. Tracing how mutually incompatible political and security "keys" interact across systemic, regional, and gatekeeper levels, the study demonstrates that Afghanistan remains selectively connected through managed dissociation rather than integrated into a coherent corridor order. Internal institutional weaknesses, governance deficits, and security challenges are real and enter the model as constraints on gatekeeper agency; the claim is that the geopolitical lock is the binding constraint, such that resolving internal deficits alone would not unlock connectivity, whereas easing the lock would change the payoff structure for every other constraint.

1. Main Findings

The core research question asked how the interplay of great-power rivalry (United States, China, Russia), regional competition (especially the Pakistan-India port rivalry), and Taliban-ruled Afghanistan as sovereign gatekeeper sustains a geopolitical lock on connectivity between Central Asia and South Asia, and what this reveals about the country's prospects for becoming a functional corridor. The analysis demonstrates that the lock persists because the conditions required for unlocking are distributed across rival actors whose demanded keys are structurally incompatible, while the gatekeeper lacks the recognition, financial access, and institutional credibility to reconcile them.

This reading is corroborated from the side of the states that would gain most from unlocking. The author's parallel studies of Uzbekistan's strategic pragmatism and Kazakhstan's pragmatic non-recognition show that both deliberately engineer reversibility into their engagement, concentrating on segments they control while deferring irreversible commitment. Managed dissociation is thus sustained from both directions: the holders of the decisive conditions do not concede them, and the prospective beneficiaries adapt in ways that reduce their own incentive to force the issue.

The quantitative baseline is stark. Afghanistan's total exports in 2023 amounted to approximately USD 870 million against an estimated potential of USD 4-6 billion were corridor infrastructure operational, a realization rate below 20 per cent. At Mes Aynak, committed capital as of mid-2026 is effectively zero: no financing agreement concluded, no construction contract let, no copper extracted from a deposit estimated at USD 50-100 billion. This financing gap, near 100 per cent, is the most direct numerical expression of the lock in operation. The UAP Railway had seen no track laid

inside Afghanistan as of 2026 despite repeated endorsements and a positive feasibility assessment.

Central Hypothesis - CONFIRMED. Connectivity along the Central Asia-South Asia axis remains locked not by technical or economic deficits but because integrated corridors would disproportionately advantage one rival actor, prompting others to block or delay them through statecraft tools, preferring frozen fragmentation to competitor gains. Across both cases the drivers of blockage were relative-gains calculations and strategic denial rather than infeasibility: the higher a project's strategic value, the more intensely rivals sought to shape, delay, or redirect it, contradicting liberal-functionalist predictions in a most-likely setting.

Corollary 1 (Great Power Deadlock) - CONFIRMED. Projects threatening to tilt strategic balances provoke intensified blocking, producing stalemate even where feasibility is demonstrated. The UAP Railway, a most-likely case with clear viability, regional demand, and repeated endorsement, remains unbuilt because competing U.S., Chinese, and Russian corridor visions, Pakistan-India port competition, and sanctions-related financing barriers have prevented any workable implementation framework for the Afghan segment.

Corollary 2 (Gatekeeper's Constrained Agency) - CONFIRMED. Taliban-ruled Afghanistan can secure only piecemeal bilateral deals rather than comprehensive integration. Despite renewed Sino-Taliban engagement in 2023-2025 and demonstrable bargaining capacity, Mes Aynak remains partially activated, constrained by U.S.-led sanctions, absent banking access, Chinese risk aversion over investment protection in a non-recognized state, and the Taliban's own ideological and institutional limits. Gatekeeper agency is real but insufficient to overcome the structural lock.

Corollary 3 (Managed Dissociation as Equilibrium) - CONFIRMED. Absent a grand bargain or major shift in great-power relations, the plausible outcome is selective, fragmented connectivity through bilateral, sector-specific corridors. The cross-case pattern, reinforced by ring-fenced CASA-1000, stalled TAPI, and the Qosh Tepa Canal, confirms this is not a transitional stage but a stable, intended equilibrium serving all major actors revealed preferences. Afghanistan is neither fully isolated nor genuinely integrated but selectively connected through arrangements that do not coalesce into a rules-based corridor between Central Asia and the Indian Ocean.

The dissertation's stated aim, to examine Afghanistan's role in regional connectivity by identifying the political, security, economic, and institutional factors shaping its integration into regional transport, trade, and energy networks, and to assess the conditions and prospects for enhancing connectivity between Central Asia and South Asia under the evolving regional geopolitical environment, has been achieved. The model, developed in Chapter 1, operationalized through the Geopolitical Rivalry Matrix, applied in Chapter 3, and evaluated against alternative explanations in Chapter 4, yields a causal account beyond descriptive narratives of project failure and a portable, falsifiable framework with demonstrated validity for 2021-2026.

The research programme carried out to achieve this aim produced seven distinct results, corresponding to the seven research tasks.

First, the scope conditions of liberal functionalism were established: it is not refuted by the Afghan case but mis-specified for contested spaces, since its expectation that mutual gains generate cooperative momentum holds only where relative-gains concerns are muted and no actor can convert transit geography into political leverage.

Second, an original analytical framework was constructed: the geopolitical lock-and-key model, comprising the structural lock, actor-specific keys, the sovereign gatekeeper, and managed dissociation, each translated into observable indicators so that the framework yields falsifiable expectations rather than post hoc description.

Third, the strategies of global and regional actors were systematically mapped through the Geopolitical Rivalry Matrix, establishing that the conditions attached to participation by the United States, China, Russia, Pakistan, India, Iran, the Central Asian states, and Kabul are not merely divergent but mutually incompatible — the property distinguishing a lock from ordinary bargaining friction.

Fourth, the mechanisms of suppression were identified and traced: corridor-level rivalry expressed in competing route promotion and bypass investment; financial exclusion through sanctions exposure and withheld banking access; and gatekeeper-level constraint arising from non-recognition.

Fifth, the implementation prospects of the principal initiatives were evaluated comparatively, the UAP Railway and Mes Aynak, supported by CASA-1000, TAPI, the Lapis Lazuli route, and the Qosh Tepa Canal, demonstrating that the same mechanism operates across transport and extractive domains.

Sixth, the conditions and alternative trajectories were specified: an adjustment of the financial key, a credible and verifiable security commitment, and a bounded transit arrangement among the endpoint states, developed into three scenarios each with its causal logic, indicator signature, and falsification conditions.

Seventh, evidence-based policy recommendations were formulated for the Central Asian states, the South Asian endpoint states, the external powers, the international financial institutions, and Kabul, each addressed to the instruments that actor actually controls.

2. Provisions Submitted for Defence: Substantiated Results

The seven provisions submitted for defence are substantiated by the evidence of Chapters 2 to 4 and restated below as established results.

1. Afghanistan's connectivity deadlock is explained by a geopolitical lock rather than technical or institutional weakness alone: a structural lock in which great-power rivalry, corridor and port competition, and sanctions regimes interact to suppress connectivity despite geographic centrality and repeated initiative.
2. The geopolitical lock-and-key model constitutes a new theoretical framework for analysing connectivity in contested sovereignties, explaining outcomes through the incompatibility of keys and accounting for corridors that remain blocked while technically feasible and economically rational.
3. Taliban-ruled Afghanistan functions as a sovereign gatekeeper whose bounded agency is central to outcomes: it exercises territorial control, collects revenue, and issues transit permissions, yet its bargaining power is constrained by sanctions, non-recognition, and external vetoes.

4. Managed dissociation captures the most probable equilibrium under continuing rivalry and sanctions: an intermediate outcome between comprehensive connectivity and isolation, in which narrow, sector-specific, reversible arrangements coexist with blocked multi-purpose corridors.
5. The UAP Railway and Mes Aynak are two manifestations of a single mechanism: the railway shows how rivalry and competing port strategies reinforce the lock at corridor level, Mes Aynak how sanctions and financial restrictions bound gatekeeper bargaining at project level.
6. Connectivity does not follow liberal functionalist expectations, because relative-gains and regime-survival logics dominate absolute economic benefit, which explains why attractive and repeatedly endorsed projects fail to reach implementation.
7. The multi-method design and the Geopolitical Rivalry Matrix provide a replicable approach for analysing connectivity deadlocks elsewhere, yielding a systematic method for mapping actors' goals, tools, red lines, and keys that is transferable to other contested corridors and sanctioned environments.

3. Theoretical and Empirical Contributions

The findings make three theoretical contributions. First, the dissertation demonstrates the scope limits of liberal-functionalist expectations in a most-likely case: the higher a project's strategic value, the more intensely relative-gains concerns and strategic denial appear. Infrastructure in contested regions cannot be treated as a neutral development good but must be analysed as an instrument and material embodiment of power, with implications for how multilateral corridor initiatives are designed and evaluated more broadly.

Second, it offers a theoretically precise operationalization of the sovereign gatekeeper for non-recognized, sanctioned regimes. The Taliban are neither passive victims of external constraint nor autonomous architects of Afghanistan's trajectory: they leverage territorial control, border management, and resource endowments to seek revenue and recognition, yet are circumscribed by sanctions, non-recognition, ideological red lines, and factional competition. The concept is portable to de facto states, partially recognized regimes, and sanctions-affected governments elsewhere.

Third, it substantiates managed dissociation as a category between comprehensive connectivity and isolation. Rather than moving toward unlocking, the Afghan system produces selective, bilateral, sector-specific deals; mining, limited transit, ring-fenced electricity; that generate revenue and strategic advantage without transforming Afghanistan into a unified corridor state. This contributes to political geography and international political economy by foregrounding fragmented connectivity as an intended equilibrium rather than a failed or transitional stage.

Empirically, the dissertation offers one of the first comprehensive, theoretically driven analyses of Afghanistan's post-2021 regional role in Eurasian connectivity, providing in-depth case studies of UAP and Mes Aynak, a replicable Geopolitical Rivalry Matrix, and a multi-method design adaptable to other contested corridor environments.

4. Policy Implications

Though primarily analytical, the findings carry implications for the principal actors. For the Central Asian states, the study recommends a shift from corridor diplomacy to corridor realism: alongside UAP advocacy, Uzbekistan and Kazakhstan should invest in intermediate-level infrastructure, sanctions-resilient financing architectures, and working-level engagement generating tangible gains regardless of whether flagship projects materialize.

For Pakistan, India, and Iran, the findings argue for selective compartmentalization. Endpoint rivalry is a coordination failure rather than a genuine conflict of interest, since projected volumes exceed what any single gateway could absorb; specific transit and customs arrangements can therefore proceed in parallel with wider rivalries without requiring their resolution. The realistic path is narrow, verifiable measures that reduce the political value of exclusivity: predictable border-crossing regimes with published closure criteria, reciprocal transit guarantees, and working-level customs interoperability among Karachi, Gwadar, and Chabahar; none requiring recognition or the abandonment of gateway ambitions, which is why they are feasible under the lock.

For Taliban-ruled Afghanistan, the findings highlight the limits of waiting for a comprehensive settlement of full recognition and sanctions relief before engaging; more realistic are sequenced credibility-building measures; Hairatan customs reform, standardized Mes Aynak contract terms, named-commander security guarantees; addressing the specific demands of China, Uzbekistan, and Gulf financial intermediaries without requiring Western endorsement. For the United States, the analysis recommends reorientation from punitive blanket exclusion toward conditional, project-level OFAC carve-outs modelled on the Chabahar precedent and linked to verifiable benchmarks. For China and the international financial institutions, the recommendations centre on multilateral risk distribution, ring-fenced financing architectures, and a standardized Afghanistan Connectivity Compliance Framework reducing the transaction cost of project-level engagement.

5. Limitations and Future Research

Several limitations should be acknowledged. The interview sample, though purposively selected for analytical relevance, remains small: three MoFA officials (A1-A3), five external experts (E1-E5), and fourteen survey respondents (R1-R14) cannot statistically represent elite and expert opinion, and respondents E1-E3 are predominantly Kazakhstan-based, with Indian, Iranian, Chinese, and American voices absent. The study is bounded to 2021-2026, and both principal cases remain active situations whose trajectories may change as the post-2026 evidence base develops. The model's external validity beyond Afghanistan is a proposition for future research rather than an established finding. These limitations do not invalidate the core arguments, which rest on independent evidence streams triangulated across primary sources, interviews, surveys, and secondary literature.

The scenario analysis identifies three trajectories: sustained deadlock, if sanctions tighten and regional security deteriorates; consolidation of managed dissociation as the most probable medium-term equilibrium, representing the stable intersection of all major actors' revealed preferences; and partial unlocking, the least likely but most

strategically significant, requiring simultaneous movement on a calibrated U.S. sanctions adjustment, a Chinese sovereign financing guarantee for Mes Aynak structured through non-dollar clearing, and a normalization step by Uzbekistan granting Taliban-ruled Afghanistan sovereign-counterparty status for multilateral financing. Interviewees and survey respondents consistently ranked managed dissociation as far more probable than partial unlocking over the next decade.

The model is designed to be falsifiable: decisive near-term falsification would involve either rapid, largely unconditional financing and construction of the UAP Railway's Afghan segment under current conditions, or a comprehensive Mes Aynak agreement integrating Taliban-ruled Afghanistan into global financial channels without extensive ring-fencing. Absent such developments, the structural conditions documented here indicate that managed dissociation will remain Afghanistan's connectivity reality for the foreseeable future.

Several paths for further inquiry follow. Empirically, future work could extend the horizon beyond 2026 to track how UAP, Mes Aynak, and related projects evolve, drawing on expanded elite interviews, subnational fieldwork, and systematic trade and investment data. Comparatively, the lock-and-key and managed dissociation concepts could be tested in other contested zones; the Eastern Mediterranean, the South Caucasus, or Indo-Pacific maritime chokepoints; assessing how variations in recognition status, sanctions regimes, and rivalries affect corridor outcomes. Theoretically, there is scope to deepen the dialogue between neoclassical realism, critical geopolitics, and infrastructure studies by examining how domestic political economies, private capital, and non-state actors interact with state-level keys and gatekeeper strategies, while network analysis of trade and finance combined with process tracing could illuminate how configurations of rivalry and constraint shape connectivity over time.

By integrating these findings, contributions, and trajectories, the dissertation offers a mid-range, empirically grounded framework for understanding why some strategically located states become bridges while others remain structurally constrained transit spaces. Afghanistan's experience confirms that in an era of renewed great-power competition, geography alone does not guarantee connectivity; it must be unlocked through political bargains that reconcile, rather than merely overlay, the incompatible keys of rival powers and contested sovereigns. In this sense the "unlocking" of the dissertation's title denotes the analytical question; under what conditions could Afghanistan's connectivity be unlocked; together with the associated key challenges and prospects; the answer is that no single actor holds the requisite keys, and that under current structural conditions managed dissociation remains the most probable equilibrium. Progress does not require the simultaneous resolution of all geopolitical conflicts, but it does require deliberate, sequenced changes in the key-holding positions of the actors who maintain the lock. Taliban-ruled Afghanistan cannot compel sanctions relief; the United States cannot compel Chinese investment; China cannot compel governance reform in Kabul; and the Central Asian states cannot substitute for the multilateral financing that only international financial institutions and great-power guarantees can provide. Each, however, can lower the threshold that makes the next

actor's move more feasible, and identifying those threshold-lowering steps is the practical payoff of this dissertation's theoretical investment. Whether such bargains emerge in Afghanistan or in analogous spaces elsewhere will be a central question for scholars and practitioners concerned with regional order, development, and infrastructure statecraft in the coming decade. The geopolitical lock-and-key model, validated across the UAP Railway and Mes Aynak, provides a structured diagnostic; not a roadmap to a predetermined destination, but a systematic tool for identifying which levers, if pulled, would produce which changes in which parts of the system. That is the lasting scholarly contribution this dissertation offers to the study of connectivity, contested sovereignty, and great-power rivalry in the twenty-first century.

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Appendix

The following table summarizes the anonymized elite interviews (A-series), external expert interviews (E-series), and expert survey respondents (R-series) used in the dissertation. Appendix B sets out the definitions and observable indicators of the core concepts on which the analytical frame is built.

Appendix A - Research Instruments and Respondent Profile

Table A.1. Overview of interviews and expert survey respondents

Code	Type of respondent	Role / position (general)	Main thematic focus	Date (year)	Location / mode
A1	Afghan official (elite interview)		Central Asia desk; regional connectivity and transit	2025	Kabul / online
A2	Afghan official (elite interview)		Sanctions, recognition, investment and trade	2025	Kabul / online
A3	Afghan official (elite interview)		Pakistan-India dynamics, UAP, port competition	2025	Kabul / online
E1	External expert (elite interview)	Dr. Juanyshbekov A.Y., Regional Politics Expert, Kazakhstan	Geopolitics, “geopolitical lock,” sanctions, recognition	2025	Almaty

E2	External expert (elite interview)	Prof. Malik Augan PhD Professor, Geopolitics and Regional Politics, Kazakhstan	TAPI, CASA 1000, sanctions, Central Asian risk	2025	Almaty / online
E3	External expert (elite interview)	Dr. Zhulduz Baizakova Senior Researcher, Institute for Security and Cooperation Studies, Al-Farabi KazNU	China's role, Mes Aynak, BRI and CPEC	2025	Online
E4	External expert (elite interview)	Dr. Ghulam Rasool PhD, Research Associate, Pakistan	Financing, banking restrictions, project risk	2025	Online
E5	External expert (elite interview)	Dr. Alibek PhD, Regional Geopolitics and Connectivity Specialist, Kazakhstan	Trade flows, infrastructure deficits, corridor choices	2025	Online
R1–R14	Expert survey respondents (questionnaire)	R1: Hassan Shah (Pakistan, Electoral Politics / IR); R2: Nasrullah Momand (Afghanistan, Political Science); R3: Wajid Mehmood (Pakistan, Geopolitics); R4: Noorullah Noori (Afghanistan/Pakistan, Political Sciences); R5: Fayaz Gul Mazloum Yar (Afghanistan/Iran, Afghanistan & geopolitics); R6: Mohammad Alam Amin (Afghanistan, IR/MOFA); R7: Saqib Fikree (Afghanistan/UK, IR); R8: Hijratullah Ekhtyar (Afghanistan, former Nangarhar University); R9: Adalat Momand (Afghanistan, Political Science); R10: Hijratullah Safi (Germany/Afghanistan, Paderborn University); R11: Niaz Mohamad (Afghanistan, Political Science); R12: Abdul Nabi Basirat (Afghanistan, Professor); R13: Sayed Akram	Afghanistan's connectivity prospects, obstacles, and scenarios	2025	Online survey

		Hashmi (Afghanistan, Professor); R14: Mohammad Aimal Haqmal (Afghanistan, Professor)			

Table A.2: Geopolitical Rivalry Matrix - actors, tools, red lines, and keys in Afghanistan's connectivity lock

Tier	Acto	Primary goal in Afghanistan	Primary rival(s)	Key leverage tools	Preferred project(s)	Red lines	Unlocking condition (actor "key")
Great powers	United States	Over the horizon CT; prevent adversary dominance; uphold core norms.	China; Russia; Iran.	Sanctions, asset freezes, control of dollar system, influence in IFIs.	None (priority is to prevent rival controlled corridors).	Taliban hosting transnational jihadists; Chinese/Russian military presence.	Verifiable, durable CT guarantees plus meaningful human rights and governance progress.
	China	Western periphery stability; BRI extension; resource access.	United States; India (regionally).	Conditional BRI investment; selective engagement; diplomatic backing.	Mes Aynak and associated corridor; links to CPEC and Gwadar.	U.S. military return; Afghanistan as base for anti Chinese militants.	Stable Taliban able to secure projects, contain militancy, and mitigate sanctions risk.
	Russia	Secure Central Asian flank; exclude U.S./NATO; manage extremism.	United States/NATO.	Moscow Format; CSTO ties; support for INSTC and allied corridors.	INSTC and related Eurasian routes via Iran, Caspian.	U.S./NATO basing; ISIS K or jihadist spillover into Central Asia.	Taliban backed security understanding that excludes U.S. forces and constrains jihadist threats.
Regional rivals	Pakistan	Strategic depth vs India; border security; economic transit gains.	India.	Port and corridor control; border closures; security and intelligence ties.	CASA 1000; APTTA based routes; participation in UAP.	Indian footprint in Kabul; Afghan sanctuary for TTP and anti Pakistan groups.	Taliban alignment against TTP; tacit Durand Line acceptance; limited Indian role.

	India	Contain Pakistani influence; prevent terror; access Central Asia.	Pakistan; China.	Chabahar investment; development aid; diplomatic goodwill.	Chabahar-Zaranj-Delaram axis; western Afghanistan link to Central Asia.	Afghan sanctuary for anti India groups; Taliban alignment with anti India jihadists.	Taliban guarantees against anti India terrorism; recognized Indian role via western corridors.
	Iran	Border and water security; protect Shias; sanctions bypassing corridors.	United States; Saudi Arabia; Taliban (over water/sectarian issues).	Cross border trade; fuel exports; control of western crossings; INSTC links.	Chabahar; Khaf-Herat and related rails; INSTC branches.	Systematic persecution of Shias; U.S. bases in western Afghanistan; severe Helmand water cuts.	Taliban guarantees on water sharing and Shia protection, plus acceptance of Iran centric corridors.
Bordering states	Uzbekistan	Prevent spillover; become South Asia-Central Asia connector.	Instability and extremist threats; route competition.	Electricity exports; northern infrastructure; diplomatic advocacy.	UAP Railway (Termez-Kabul-Peshawar) and related links.	Taliban collapse into civil war; cross border militant threats.	Credible Taliban security guarantees for rail/road, personnel, and predictable customs regimes.
	Turkmenistan	Energy export diversification; border stability.	Instability; pipeline sabotage.	Gas exports; “positive neutrality”; regional energy diplomacy.	TAPI gas pipeline and associated infrastructure.	Attacks on pipeline; chronic insecurity along the route.	Consortium backed TAPI with Taliban security guarantees and regional underwriting.
	Kazakhstan	Transit diversification; maintain trade stability.	Regional instability disrupting corridors.	Transit networks; grain exports; regional formats.	Integration of Afghan links into Middle Corridor if risk is manageable.	Afghanistan as persistent high intensity conflict zone.	International risk sharing and insurance mechanisms making Afghan transit commercially viable.

Sovereign gatekeeper (internal	Taliban (Taliban-ruled	Regime survival; recognition; economic self sufficiency.	ISIS K; internal dissent; external pressure.	Territorial control; border/customs revenue; resource concessions.	Any project delivering revenue plus implicit recognition (UAP, TAPI, Mes Aynak).	Foreign military presence; concessions seen as undermining core sharia governance.	Broad recognition and sanctions relief at minimum, calibrated financial reintegration without abandoning core ideological claim.

Source note (Table A.2): Author's compilation based on actor profiles in §§2.2-2.4. Interview codes in parentheses refer to elite interviews (A1-A3, E1-E5) and expert survey respondents (R1-R14) cited throughout the empirical chapters. Primary sources marked in the bibliography.

Table A.3 below summarizes the central dimensions of comparison between the two core cases.

Table A.3. UAP Railway and Mes Aynak: comparative case summary

Dimension	UAP Railway	Mes Aynak
Project type	Trans-Afghan corridor linking Central Asia to Arabian Sea ports.	Large copper mine in Logar under the Chinese MCC concession.
Main analytical focus	Systemic and regional deadlock around corridor routing, finance, and terminals.	Gatekeeper–investor bargaining under sanctions, reputational risk, and governance constraints.
Core actors	Uzbekistan, Pakistan, Taliban-ruled Afghanistan, with the U.S., China, Russia, India, and Iran shaping the corridor environment.	Taliban-ruled Afghanistan and MCC/China, with U.S.-led sanctions, global banks, and wider reputational pressures shaping the investment environment.
Main economic logic	Lower transit time and cost, expanded freight flows, and direct Central Asia–sea access.	High-value copper extraction, fiscal revenue, and long-term Chinese resource access.
Dominant blocking mechanism	Competing corridor visions, incompatible keys, sanctions exposure, and endpoint rivalry.	Bounded gatekeeper agency under sanctions, banking derisking, ESG/security concerns, and legal uncertainty.
Role of Taliban-ruled Afghanistan	Necessary territorial gatekeeper, but one actor among many veto holders.	Central territorial gatekeeper with stronger project-level leverage, but still unable to override structural constraints.
Observed outcome	Repeated agreements and feasibility momentum without construction of the Afghan segment.	Renegotiation and symbolic restart without full-scale mining activation.

Theoretical implication	Strong support for Corollary 1: Great Power Deadlock.	Strong support for Corollary 2: Gatekeeper's Constrained Agency, and major support for Corollary 3: Managed Dissociation.

Source note (Table A.3): Author's compilation. Case evidence drawn from §§3.2 (UAP Railway) and §3.4 (Mes Aynak). Theoretical implications refer to the corollaries operationalized in §1.4.

Table A.4. Systemic-level lock-holders: tools, keys, and preferred routes

Actor	Main tools (from matrix)	Key conditions ("keys")	Preferred routes/projects	Implications for UAP and Mes Aynak
United States	Sanctions, asset freezes, control of dollar system, influence in IFIs.	Durable counterterrorism guarantees, severing of ties to designated groups, meaningful human rights and governance progress.	No flagship U.S. backed Afghan corridor; support instead for alternatives that reduce dependence on Taliban controlled routes.	Financial and normative lock holder: can raise risk/cost of financing UAP and large scale mining at Mes Aynak even without direct project involvement [20, 24].
China	Conditional BRI investment, selective engagement, diplomatic backing.	Robust security guarantees for Chinese assets, suppression of groups linked to Xinjiang, credible contract and investment protection.	Symbolic inclusion of Afghanistan in BRI/CPEC; Mes Aynak; potential North-South links via Pakistan and Central Asia.	Cautious corridor builder sees UAP and Mes Aynak as opportunities but calibrates commitments to security and sanctions risk, reinforcing fragmented, project specific engagement [133].
Russia	Moscow Format, CSTO ties, INSTC and Eurasian corridor promotion.	Exclusion of U.S./NATO forces, containment of jihadist spillover into Central Asia, recognition of Russia's regional security role.	INSTC branches via Iran and the Caspian; prospective "fourth branch" via trans Afghan rail towards Pakistan.	Eurasian security broker promotes routes that complement INSTC and Russian strategic depth, supporting trans Afghan options only when they reinforce, rather than dilute, Russia's corridor architecture [198, 199, 452].

Source note (Table A.4): Author's compilation based on actor profiles in §2.1. Sources: Thomas (2025); U.S. Department of the Treasury (2025); Godek (2025); Giustozzi (2025); Aliyev (2024); Jamestown Foundation (2025). For the full nine-actor matrix, see Table A.2.

Table A.5. Expert survey: distribution of closed-ended responses (Section 2–3 items)

Survey item	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	n
Q6 Geographic position is critical to CA–SA connectivity	7	2	0	0	0	9
Q7 Security is the primary obstacle	4	2	1	1	0	8
Q8 Taliban return (2021) significantly affected transit potential	1	5	1	2	0	9
Q9 TAPI / CASA-1000 are vital for connectivity	8	1	0	0	0	9
Q10 Afghanistan needs a neutral foreign policy	2	2	2	3	0	9
Q11 External powers (China/India/Pakistan) are critical	2	4	1	0	1	8
Q12 SAARC / ECO can play a key role	1	6	1	0	0	8
Q13 Transport corridors will enhance trade and integration	6	3	0	0	0	9
Q14 Historic routes have always been vital	4	4	1	0	0	9
Q15 Taliban policies do not align with fostering trade	0	4	3	2	0	9
Q16 Natural resources can significantly enhance the economy	3	4	2	0	0	9
Q17 Infrastructure deficits are the most significant economic challenge	6	3	0	0	0	9
Q18 Sanctions and isolation have hindered FDI for connectivity	5	3	1	0	0	9
Q19 Regional trade agreements (e.g., APTTA) are essential	3	4	0	1	1	9
Q20 IFIs (WB/IMF/ADB) should play a more active role	2	5	0	2	0	9
Q21 BRI participation could significantly boost connectivity	0	7	0	1	1	9
Q22 Corruption and weak governance are major barriers	5	2	1	1	0	9

Note: Counts reflect the survey respondents who completed each closed-ended item (n = 8-9 of the fourteen respondents); the remaining respondents provided open-ended answers only, which are analysed qualitatively in Chapters 3-4. Items used a five-point agreement scale; "strongly agree" and "agree" are reported separately. Consistent with the small sample, the survey is used descriptively for triangulation, not for statistical generalization. Source: author's expert survey (R1-R14), 2025.

APPENDIX B - DEFINITION OF CORE CONCEPTS

The analytical framework of this dissertation is built upon several core concepts that require precise definition. These terms are not merely descriptive but are operationalized as specific, measurable components of the geopolitical lock-and-key model, enabling rigorous empirical testing across cases [31, 32]. Each definition includes observable indicators, theoretical grounding, and dissertation-specific application, ensuring conceptual clarity and falsifiability. The definitions of the geopolitical lock, key, sovereign gatekeeper, managed dissociation, and unlocking given below are the author's own formulations, developed within the geopolitical lock-and-key model; where a definition adapts an established concept from the literature, the corresponding sources are cited.

1. Geopolitical Lock

A strategic condition of sustained deadlock in which the connectivity potential of a geographic space is systematically suppressed. This lock is not a passive absence of development but an active, politically engineered outcome, maintained through deliberate state actions such as sanctions (for example, U.S. OFAC asset freezes), alternative financing offers (for example, China BRI vs. Russia INSTC), diplomatic pressure on neighbouring states, or support for destabilizing actors that are motivated by relative gains logic [13]. Actors prioritize preventing a strategic adversary from gaining control or influence over the corridor over achieving potential collective economic benefits (absolute gains). Unlike accounts of weaponized interdependence, which emphasize a hub state's unilateral exploitation of network centrality, or notions of strategic denial and sanctions-driven exclusion, the geopolitical lock is conceptualized as a structured, multi-actor mechanism: it combines multi-level veto configurations, the bounded agency of a territorial gatekeeper, and mutually incompatible unlocking conditions ("keys"), so that no single actor can either impose or dissolve the deadlock unilaterally.

Observable Indicators: Stalled projects despite positive feasibility studies (for example, UAP Railway remains unbuilt despite ADB confirmation of economic viability); competing financing announcements by rival powers for alternative routes; diplomatic interventions blocking or delaying project implementation; explicit rhetorical framing of connectivity as zero-sum competition.

2. Sovereign Gatekeeper

The de facto governing authority exercises effective territorial control over a contested space, verified by monopoly on the legitimate use of force and capacity for revenue extraction [114, 196]. By virtue of this control, the gatekeeper holds the proximate power to permit or deny physical and economic passage (for example, border permissions, transit rights, security guarantees for infrastructure). Its agency is a critical variable: while constrained by internal ideological commitments (for example, sharia governance) and external structural pressures (for example, sanctions, non-recognition), its cooperation is the non-bypassable condition for any material unlocking to occur.

Dissertation Application: In this study, the Taliban's Islamic Emirate of Afghanistan, referred to throughout this dissertation as Taliban-ruled Afghanistan, is the sovereign gatekeeper, evidenced by post-2021 control of full Afghan territory and

functioning border administration [185, 456, 457]. While existing scholarship on de facto regimes and border gatekeeping addresses related phenomena, the sovereign gatekeeper is defined here more narrowly: an authority whose territorial control and fiscal capacity make its consent a non-bypassable prerequisite for any integrated corridor, even as its agency remains structurally bounded by sanctions and non-recognition. This combination of indispensable consent and structural constraint distinguishes the concept from generic notions of limited sovereignty or of a sanctioned regime.

Observable Indicators: Territorial control (absence of effective rival authority); ability to collect customs revenues and issue transit permits; capacity to engage in bilateral negotiations with neighbouring states and external investors; exercise of veto power over corridor projects through security or regulatory means.

3. Key (Condition for Unlocking)

An actor-specific political or security condition, typically articulated as a specific and often non-negotiable demand by a state actor (or by the gatekeeper itself), that must be met for that actor to actively support or cease obstructing an integrated connectivity project. Keys are typically political or security concessions that are structurally at odds with those demanded by other actors, creating mutual vetoes. Examples include U.S. counterterrorism guarantees (for example, Haqqani Network de-listing), China's demand for security pacts protecting investments, Russia's insistence on border and sphere-of-influence recognition, and Taliban-ruled Afghanistan’s demand for full sovereignty acknowledgment and sanctions relief [22]. The incompatibility of these keys across actors is the fundamental mechanism perpetuating the lock.

Observable Indicators: Explicit conditionality statements in official documents (for example, "sanctions relief contingent on counterterrorism cooperation"); diplomatic communications linking support for a project to political concessions; financing decisions conditional on security guarantees; deal breakdowns attributed to failure to meet specific political conditions.

Operationalization: The Geopolitical Rivalry Matrix codes each actor's demanded keys and traces whether they align or conflict across cases. In terms of analytical status, a key is neither a background variable nor a mere rhetorical demand: it is a condition located at the level of individual actors, systemic, regional, and gatekeeper alike, whose configuration of compatibility or incompatibility constitutes the causal mechanism linking the systemic lock to national-level agency. What the empirical chapters test is therefore not whether individual keys are satisfied, but whether their mutual incompatibility produces the deadlock predicted by Corollary 1.

4. Managed Dissociation

I use the term managed dissociation to describe a sub-optimal but stable equilibrium in geopolitically locked spaces. Managed dissociation arises when entrenched rivalries and sanctioning practices prevent comprehensive unlocking, yet territorial gatekeepers and external powers still construct limited, bilateral, or sector-specific corridors through discrete bargains (for example, a China–Afghanistan mineral-export route or a Pakistan–Afghanistan electricity transmission line). In such configurations, connectivity is fragmented: specific resources (such as minerals, water,

or electricity) move along narrow, single-purpose channels rather than being integrated into multi-purpose regional transport corridors. Managed dissociation is thus neither comprehensive corridor connectivity nor complete isolation, but a durable middle state characterized by selective access and persistent strategic fragmentation, echoing broader debates on dissociation from cooperation and on geoeconomic fragmentation without reproducing their institutional focus [458]. Two clarifications delimit the concept. First, management is not attributed to a single orchestrating hegemon: it is produced by the combined, deliberate choices of sanctioning coalitions calibrating carve-outs, international financial institutions designing ring-fenced arrangements, regional powers structuring sector-specific bargains, and the gatekeeper itself accepting narrow deals, each actor intentionally compartmentalizing engagement while avoiding comprehensive normalization. Second, the concept operates on the dimension of connectivity rather than integration: integration presupposes institutionalization, policy coordination, and shared rules, whereas connectivity denotes the presence and functioning of transport, energy, and trade linkages, and managed dissociation describes a patterned restriction of the latter. Unlike selective connectivity, fragmented regionalism, or ordinary partial engagement, managed dissociation therefore designates a stable equilibrium in which fragmentation is intentionally maintained through legal, financial, and diplomatic design, and in which narrow, ring-fenced projects coexist with continued investment in bypass corridors.

Observable Indicators: Bilateral deals that proceed in isolation from multilateral frameworks; sector-specific agreements (mining, electricity) that do not expand into broader corridor integration; frequent pauses or reversals of projects due to external pressures; absence of multi-national financing consortia or joint governance frameworks; persistence of parallel, competing route proposals rather than convergence on shared infrastructure.

Dissertation Application: This concept captures the most likely outcome of the geopolitical lock as demonstrated across the UAP and Mes Aynak cases, where fragmented, piecemeal arrangements emerge but comprehensive corridor integration remains blocked.

5. Unlocking (Connectivity)

The process whereby a contested geopolitical space transitions from being a zone of blocked transit to a functional, integrated corridor for sustained regional trade and energy flows. In this study, unlocking is measured not merely by the construction of infrastructure (for example, kilometres of track laid), but by the secure, regulated, and economically viable movement of goods and resources across sovereign territory for example, achieving >$1 billion annual trade volume with <5% disruption rates enabled by convergence of political will among competing external states (U.S., China, Russia) and the consent of the territorial authority (Taliban-ruled Afghanistan) [89, 90, 91, 96]. It represents the successful alignment of necessary "keys" across multiple actors, operationalized as multi-actor financing agreements, operational infrastructure, and sustained cross-border flows. In the empirical analysis, fully integrated unlocking functions primarily as a counterfactual benchmark against which the observed pattern

of stalled projects and fragmented deals is assessed, rather than as an outcome realized in Afghanistan during the period under study (2021-2026).

Observable Indicators: Multi-national financing agreements signed and disbursed; physical construction completed and operational; sustained trade and transit flows documented in customs and trade statistics; joint governance or regulatory frameworks established; absence of significant disruptions due to political interference over sustained periods (for example, 2+ years).

6. Connectivity Corridor

A planned or operational infrastructure system comprising transportation networks (rail, road, ports), energy transmission lines (pipelines, electricity grids), and associated regulatory and governance frameworks designed to facilitate the sustained, economically significant movement of goods, energy, and potentially people across international borders and through multiple sovereign territories [7]. Corridors are distinguished from isolated infrastructure projects by their multi-national scope, strategic integration into broader regional or global networks (for example, BRI, INSTC), and political embedding within great power or regional rivalry frameworks [8].

Dissertation Application: This study focuses specifically on corridors linking Central Asia to South Asia via Afghanistan, examining the UAP Railway as a prototypical North-South connectivity corridor and Mes Aynak as a large-scale extractive project embedded in potential corridor networks, both of which become sites of geopolitical contestation rather than purely technical undertakings.

Observable Indicators: Multi-country memoranda of understanding; feasibility studies spanning multiple jurisdictions; explicit framing within named regional initiatives (BRI, INSTC, Chabahar strategy); diplomatic negotiations at multilateral forums referencing the corridor; media and official discourse labelling the infrastructure as a "corridor" or "axis" with strategic significance.

7. Relative vs. Absolute Gains

A core distinction in realist International Relations theory that differentiates between concerns about relative position vis-à-vis rivals (relative gains) and concerns about net benefits regardless of others' gains (absolute gains) [13, 28].

- **Absolute Gains Logic:** Actors cooperate if all parties benefit, even if benefits are unevenly distributed. Liberal functionalism predicts that shared economic interests (for example, increased trade from connectivity) drive cooperation [14].
- **Relative Gains Logic:** Actors refuse cooperation if it disproportionately benefits a rival, even if the actor itself would gain in absolute terms. This logic underpins the geopolitical lock: great powers block corridors that would enhance a rival's strategic position (for example, China's access to Central Asia, Russia's control of energy routes) even when blocking foregoes collective economic benefits [12, 459].

Dissertation Application: The geopolitical lock-and-key model is grounded in relative gains logic, arguing that connectivity deadlocks persist because actors prioritize preventing rival advantage over achieving mutual gains. This directly challenges functionalist predictions and is tested empirically through the UAP and Mes Aynak cases.

Observable Indicators: Blocking actions that impose costs on the blocker (for example, foregoing investment opportunities, financing alternative routes at higher cost); explicit zero-sum rhetoric in official discourse ("we cannot allow X to control this route"); prioritization of denying rivals' access over securing own absolute gains.

These definitions establish shared analytical vocabulary and operationalize the core components of the geopolitical lock-and-key model. They render the model empirically testable by specifying observable indicators that can confirm or disconfirm the hypotheses across the UAP Railway and Mes Aynak cases. Each concept is grounded in established IR theory while being adapted to the specific empirical context of post-2021 Afghanistan connectivity politics, ensuring both theoretical rigour and empirical precision.