



**VIENNA PROGRAMME OF ACTION
FOR LANDLOCKED DEVELOPING COUNTRIES
FOR THE DECADE 2014–2024**

**AFGHANISTAN
COUNTRY REPORT**

FEBRUARY 2019

STANDARD DISCLAIMER

This Country Report has been prepared by the Economic Cooperation Department of the Ministry of Foreign Affairs of Afghanistan, in collaboration with the SDGs Executive Committee based on the completed questionnaires by the relevant line ministries and government agencies. Additional references used for the preparation of this report are listed in the end of this document.

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Introduction

As a land-locked and post-conflict country, Afghanistan continues to face numerous special development needs and challenges including those related to lack of access to regional and international markets, infrastructure gaps, investment deficit as well as shortage of human and institutional capacity in various areas. Afghanistan is also experiencing the challenging task of pursuing peace and reconciliation while remaining a battle front in countering terrorism which continues to cause huge loss of life in the country.

Following the fall of Taliban regime in 2001, a new era of reconstruction and development began in the country characterized by active international support and considerable improvement in major areas including economic growth, infrastructure development, education, health, access to justice, human capital development and women's empowerment.

However, following the drawdown of international forces from Afghanistan in 2014 which coincided with the presidential elections and the commencement of the Transformation Decade (2015-2024), the government of Afghanistan had to deal with the impact of three simultaneous security, political and economic transitions including a sharp decline in the growth rate; a considerable increase in the percentage of people living below the poverty line; deteriorating employment situation; security threats in some provinces, migration and refugee flows as well as the displacement impact.

With a view to address the challenges associated with landlockedness and post-conflict situation and mitigate the impact of the three transitions, the government of Afghanistan, over the past three years, has placed a special focus on areas and sectors that have greater potential to contribute to growth, job creation, income generation as well as trade and transit facilitation and export promotion.

First, the Afghan government embarked on an ambitious reform agenda outlined under the Afghanistan National Peace and Development Framework (ANPDF) which was presented to the Brussels Conference on Afghanistan in October 2016. The Government has also developed a number of National Priority Programs (NPPs) which cover important areas such as infrastructure development, agriculture development, rural and urban development, human capital development, private sector development and women's economic empowerment, all capable of contributing to the goal of achieving a self-reliant economy. Furthermore, the government has developed a domestic production-led growth policy, a National Export Strategy and a National Trade Policy.

Second, the government has made remarkable efforts to mainstream the global development agenda into national development planning which includes the development of Afghanistan Sustainable Development Goals (A-SDGs) while bringing coherence among ANPDF, NPPs, A-SDGs as well as the Vienna Program of Action (VPoA) and Istanbul Program of Action (IPoA).

Third, Afghanistan has made intensive efforts to utilize its central location as a regional land-bridge in support of increased growth in Afghanistan and greater connectivity and trade in the wider region which has resulted in promising progress over the past few years.

Thanks to these efforts supported by the international community, Afghanistan has experienced a slight recovery in growth since 2015 and the economy is expected to grow further in the next few years.

On 27–28 November 2018, the Geneva Conference on Afghanistan was co-hosted by the Government of the Islamic Republic of Afghanistan and the United Nations with the participation over 60 countries and organizations, providing the opportunity for renewing partnership and cooperation for Afghanistan's peace, prosperity and self-reliance. The Geneva Conference Communique and the Geneva Mutual Accountability Framework (GMAF) provide a clear roadmap for joint efforts towards the realization of Afghanistan's development objectives in the next two years.

Mainstreaming of the VPoA

into the National
Development Plan
and coherence
and linkages with
the Post-2015
Development
Agenda and other
global processes

The government of Afghanistan attaches a great significance to the global development agendas. The Afghanistan National Development Strategy (2008-2013) was an MDGs-based strategy. Furthermore, in September 2015, Afghanistan joined other nations to adopt the Sustainable Development Goals (SDGs) which guides our efforts on sustainable development in Afghanistan until 2030.

As part of the broader efforts to mainstream the current global development agendas into national development planning, the nationalization of SDGs' targets and indicators has been underway over the past 3 years through a participatory process which included a series of national consultation conferences, seminars, meetings and workshops. This rigorous consultation process, led by the Ministry of Economy, has resulted in the adoption of Afghanistan Sustainable Development Goals (A-SDGs), which include 16 goals, 112 targets and 178 indicators. As the SDGs Secretariat, the Ministry of Economy (MoE) is tasked with coordinating the overall nationalization and implementation of SDGs and reporting to the High Council of Ministers and the Cabinet on a regular basis. The Ministry of Economy has established four working groups in eight different sectors to closely monitor and report progress on A-SDGs during their integration and implementation phases. Over the past three years, these working groups have worked with the responsible government agencies on refining the A-SDG indicators and baselines as well as organizing and reporting data.

With a view to incorporate the A-SDGs into the budget process and development planning at the national and sub-national levels, the 17 goals have been divided into 8 national sectors and 17 sub-sectors.

At an institutional level, the High Council of Ministers oversees and supervises the nationalization, alignment and implementation of SDGs in the country. The Council ensures that all budget entities have fully included the SDGs targets and indicators in their development strategies and policies.

An Executive Committee on SDGs has also been established within the Office of the Chief Executive with a view to expedite the implementation of the SDGs and to ensure that reporting against the national indicators and targets takes place consistently. The Executive Committee aims to oversee the overall coordination and ensure coherence and synergy among A-SDGs, ANPDF, and NPPs. The Executive Committee pursues a multi-stakeholder approach and makes efforts to ensure that all stakeholders including the government, private sector, civil society organizations and the international community are all directly engaged in the process.

In order to ensure greater synergy and coherence among various global development agendas at a national level, the Istanbul Program of Action for Least Developed Countries (IPoA) and the Vienna Program of Action for Land-locked Developing Countries (VPoA) have been recently incorporated into the work of the Executive Committee on SDGs which will include the utilization of the Executive Committee as a national mechanism for coordination, monitoring and reporting including data collection and analysis on the two programs of action. Furthermore, with a view to better coordinate and facilitate South-South and triangular cooperation in support of the implementation of A-SDGs, IPoA and VPoA, South-South cooperation has also been incorporated in the work of the Executive Committee on SDGs.

Bringing coherence and synergy in this context is expected to facilitate the mainstreaming of the VPoA into National Development Plan. The priority areas under VPoA have also been mainstreamed into the regional cooperation agenda as pursued under two prominent Afghanistan-centered regional cooperation platforms: The Regional Economic Cooperation Conference on Afghanistan (RECCA) and Heart of Asia – Istanbul Process (HoA-IP).

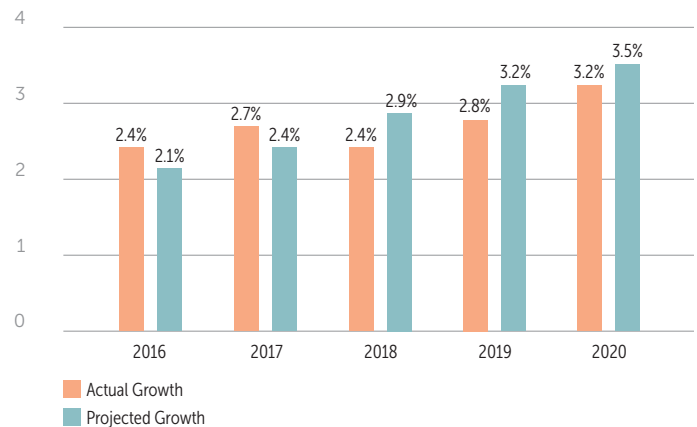
Key Economic, Social and Environmental Development Trends

Following three challenging years in the aftermath of security transition in 2014, the overall growth began to improve slowly from 1.3 percent in 2015 to 2.7 percent in 2017. Growth is expected to further accelerate, reaching around 3 percent by 2020 (as shown in Figure 1).

There have been a number of important trends with positive impact on the overall growth over the past two years:

First, due to various initiatives and efforts including in the areas of connectivity and trade and transit facilitation, exports grew significantly in 2017 and 2018. Exports in 2017 were 28 percent higher than 2016 exports. According to latest report by the Ministry of Industry and Commerce, the country's exports further grew in 2018 and the volume reached about \$1 billion in the first nine months of 2018, showing a 19 percent increase compared to the same period in 2017.

Figure 1: **Economic Growth Trajectory** (2016 – 2020)



SOURCE: MoF, ANPDF Progress Report (2018)

Second, as a result of reforms in the financial management system, revenues continued to grow considerably in 2017 and 2018, exceeding the projections each year. As Figure 2 shows, revenue collection grew by 20% in 2017, comprising 12% of GDP.

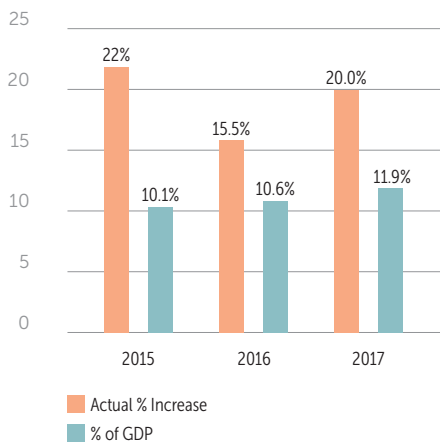
Third, thanks to continued reforms and efforts to create an enabling policy and regulatory environment for investment and trade expansion, Afghanistan was ranked under the World Bank Doing Business Report in 2018 as a Top Improver with Record Reforms to Improve Business Climate, jumping up from 183 in 2018 to 167 in 2019. The latest reforms were in the Doing Business areas of Starting a Business, Getting Credit, Protecting Minority Investors, Paying Taxes, and Resolving Insolvency.

There have been, however, a number of negative trends over the past two years including a sharp increase in the number of people living below the poverty line, reaching 54 percent in 2016–2017, compared to 39 percent in 2012–2013. Furthermore, recent drought in some parts of the country has had a server negative impact on agriculture growth and the overall living standards and food security resulting in an increase in the imports including grain imports.

Additionally, population growth rate has remained high around 2.5 percent over the past few years which is the highest population growth rate among countries in South-Central Asia. Job creation has not grown in proportion to population growth, leaving at least a quarter of the labor force unemployed. The return of close to 2 million Afghan refugees mainly from two neighboring countries coupled with an increase in the number of Internally Displaced People (IDPs) put further pressure on the economy including with respect to service delivery.

Pursuing the development objectives as outlined under ANPDF, NPPs, A-SDGs, VPoA, IPoA and other development agendas under a coherent and integrated approach is expected to contribute significantly to overcoming these challenges, leaving a positive impact on the overall growth and poverty reduction in the next few years.

Figure 2: **Revenue Collection**



SOURCE: MoF, ANPDF Progress Report (2018)

Fundamental Transit Policy Issues

While Afghanistan continues to face the challenges associated with landlockedness, the country, due to its geo-economic location, plays a crucial role in regional and inter-regional connectivity. Afghanistan stands as a point of convergence, a land-bridge and a connecting hub between Central Asia, South Asia, Far East and the Middle East and Europe. Therefore, transit issues remain crucial for the country both in terms of addressing the challenges associated with landlockedness as well as in utilizing the enormous economic opportunities associated with Afghanistan's centrality.

Creating new transit and transport corridors has remained a top priority for the government of Afghanistan including under RECCA and HoA-IP. The following four corridors have been prioritized under RECCA:

The Lapis Lazuli Route: After four rounds of technical discussions, the Lapis Lazuli Route Agreement was finalized and subsequently signed by Afghanistan, Turkmenistan, Azerbaijan, Georgia and Turkey on the sidelines of RECCA-VII on November 15, 2017 in Ashgabat, marking an important milestone in the collective regional efforts towards greater connectivity and integration. The agreement addresses both hard and soft infrastructure and includes areas such as infrastructure facilities for multimodal transport, transport cooperation, visa facilitation and simplification of customs procedures. Once implemented, the agreement will not only enhance regional economic cooperation and connectivity among the contracting parties, but it will also contribute significantly to the Eurasian Continental trade and transport network, creating enormous economic opportunities for the peoples of the wider region including Afghanistan. The protocol on rail transportation has been finalized and the work on the protocol regarding visa facilitation is underway. Two Expert Group Meetings (EGMs) have so far been held in Ashgabat (April 2018) and Herat (December 2018) and the first shipment through Lapis Lazuli Route was successfully conducted under TIR system in December 2018.

The Chabahar Corridor: The International Transport and Transit Corridor Agreement also known as the Chabahar Agreement was signed in Tehran in May 2016 among Afghanistan, India and Iran. The Chabahar Port is expected to facilitate the movement of goods and passengers between the contracting parties. During the final phase of its development, the port is expected to be capable of handling 20 million tons of trade annually. The First Meeting of the Coordination Council between the contracting parties was held on October 23, 2018 in Tehran, Iran where the participants discussed measures to implement the Chabahar Agreement including the next steps in drafting and finalizing the relevant protocols. India has shipped 1.1 million tonnes of wheat and 2,000 tonnes of lentils to Afghanistan via Iran's Chabahar Port, and most recently, the first shipment of Afghan goods was sent to India via Chabahar Port during a ceremony on February 24, 2019.

The Five Nations Railway: The Five Nations Railway project connects the railway route among five countries of China, Kyrgyzstan, Tajikistan, Afghanistan and Iran traversing about 902 km inside Afghanistan. Both pre-feasibility and feasibility studies for the majority of the Afghan segment is now completed. According to an MoU between the Islamic Republic of Afghanistan and the Republic of Uzbekistan on the project "Financing, Design and Construction" of Mazar-e Sharif-Herat Railway, a total of 657 km of technical and field studies of the project are being prepared. The MoU is intended to finance the requirements of the project which includes an international consortium with the participation of banks, organizations and countries in the region. Furthermore, the third segment of the Khaf-Herat railway between Iran and Afghanistan which forms one segment of the Five Nations Railway is completed and will be ready for operation in few weeks.

The work on other railway segments inside Afghanistan has also progressed significantly over the past two years. A 13-kilometer railway line connecting the Turghundi Cross Border Station to Serhetabat in Turkmenistan was operationalized in February 2018. Afghanistan and Turkmenistan have agreed recently to build the 10 km new main & loop railway lines in Aqina cross border station.

The Belt and Road Initiative and Afghanistan: In May 2016, the Afghan and Chinese Foreign Ministers signed an MoU to boost various areas of cooperation between the two countries under the Belt-and-Road Initiative (BRI). Given the central location of Afghanistan at the crossroads of Central, South, and Southwest Asia, Afghanistan is well placed to both contribute to and benefit from the BRI.

In August 2016, the first Chinese train traveled from western China to Afghanistan, via a winding route through Kazakhstan and Uzbekistan, arriving at the land port of Hairatan in Afghanistan in September 2016. The full operationalization of this landmark connectivity project is expected to reduce trading costs between both nations by 30%. In addition, in mid-2016, Kabul-Urumqi flights resumed.

A new trilateral cooperation framework has recently been initiated between Afghanistan, Pakistan, and China with a view to promote economic cooperation among the three countries within the Belt and Road Initiative and RECCA. Additionally, Afghanistan became a permanent member of the Asian Infrastructure Investment Bank (AIIB) in October 2017, which is expected to further facilitate cooperation on infrastructure development between Afghanistan and regional countries under the BRI and RECCA.

Other major transport and transit routes: Afghanistan has signed bilateral transit and transport agreements with most of the neighboring and regional countries. The work on two new trilateral transit and transport corridors 1) between Afghanistan, Turkmenistan and Kazakhstan; and 2) between Afghanistan, Uzbekistan and Kazakhstan is also underway. Furthermore, various air cargo corridors have recently been operationalized with India, Kazakhstan, Turkey, EU, Russia, UAE, Saudi Arabia and China and over 6000 tons of Afghan products have so far been transported from Afghanistan through these air corridors.

Considerable efforts have also been made recently to improve soft infrastructure. To enhance cooperation and coordination with the customs administrations of other countries and for harmonization and simplification of customs procedures, the Afghanistan Customs Department (ACD) has actively engaged in continuous dialogue with the relevant authorities of neighboring and regional countries. Efforts in this regard include signing of Customs Mutual Administrative Assistance Agreement (CMAA) with a number of countries including Turkey (2005), Tajikistan (2014), China (2017) and Uzbekistan (2017). Additionally, draft CMAAs with Electronic Data Interchange Protocols have been shared with Pakistan and Iran in 2017. CMAAs have also been drafted and shared with India, Turkmenistan, Kazakhstan, United Arab Emirates and Russia.

The ACD has worked with other relevant ministries and agencies to develop and implement the TIR Procedure in customs across the country. Furthermore, the ACD has also played a leading role in the operationalization of a One-Stop-Shop for export at the Hamid Karzai International Airport which is expected to be replicated in other customs across the country.

Afghanistan has acceded to the TIR convention and a National Committee on TIR has been established under the Ministry of Transport to implement the convention in the country. A number of pilot shipments to neighboring and regional countries have so far been conducted under the TIR system. The new Transport Law has been developed by the Ministry of Transport which, among other objectives, will further simplify the transport procedures and improve coordination among the relevant departments. The Information and Communications Technology (ICT) has been increasingly utilized in the transport sector including in collecting the transport fees.

Infrastructure Development and Maintenance

The government of Afghanistan has also made efforts including under the transport and transit agreements to simplify visa procedures and improve information sharing on issues related to customs, transport and transit. In the 2nd EGM on the implementation of the Lapis Lazuli Route Agreement held on December 06-07, 2018 in Herat, Afghanistan, the participants agreed to strengthen cooperation under the protocol on rail transportation to minimize time and cost of transit along the route, expand cooperation in the area of logistics including through creating joint freight forwarding and logistic companies, and improve information sharing.

Afghanistan continues to face huge infrastructure gaps in various areas. Infrastructure development has therefore remained a top priority under both the ANPDF and Afghanistan's regional cooperation agenda as pursued under RECCA and HoA-IP.

The National Infrastructure Plan (NIP) has been developed as one of the NPPs which outlines infrastructure development priorities across different sectors. According to NIP, infrastructure development can significantly contribute to the realization of Afghanistan's growth and self-reliance vision through improving productivity, competitiveness and connectivity.

According to the latest progress report on NIP, presented to the Geneva Conference on Afghanistan (November 2018), "the national infrastructure disbursement (on-budget) increased to \$632 million in 2017, 20 percent higher than 2015 with transport and energy being the dominant sectors by budget allocation and disbursement. In 2018 the infrastructure development budget allocation is \$644 million, which accounted for 42% of the total development budget. The off-budget infrastructure disbursement has declined in recent years, and for the period of 2014-2016, it averaged \$268 million per year."

The efforts to construct the remaining part of national ring road has been underway and the required fund is secured now. Other national and sub-national roads, including those connecting the country to neighboring countries have been prioritized. Fund allocation for road operations and maintenance has also been increased. The work on National Railway Network has progressed considerably over the past few years leading to the completion of pre-feasibility and feasibility studies as well as detailed design for various segments inside the country including those connecting the country to regional transport and transit corridors as outlined above. The Ministry of Public Works has also recently developed a new strategy for road maintenance.

The Afghanistan Civil Aviation Authority (ACAA) has recently been established in accordance with the newly approved Civil Aviation Law (CAL) to manage the civil aviation activities including development and operations of all airports and the required facilities and infrastructure across the country.

Energy sector remains an important part of NIP. Priorities in this sector include "improving access, expansion and supply with new investments covering the national grid network (transmission and sub-stations, and distribution systems), energy generation (finalizing feasibility studies and decisions on prioritized large multi-purpose hydro dam investments) and renewable (solar) plants; and rural electrification." Efforts have also been made by the Ministry of Rural Rehabilitation and Development (MRRD) to improve access to energy in rural areas. Under the National Solidarity Program (2003-2015) 7826 energy projects including small hydro and solar projects implemented in villages across the country. The Energy for Rural Development Afghanistan (ERDA) was also implemented by MRRD which included the implementation of 177 micro-hydro

projects totalling 3.2 MW and 300 biogas projects in rural communities in Afghanistan. ERDA has also supplied 310 solar projects for Kuchi communities. MRRD currently has two on-going programs with respect to rural energy under the Citizen's Charter National Priority Program.

Energy along with transport networks and communications constitute three major clusters under RECCA. In addition to major transport and transit corridors and the associated infrastructure projects explained above, the following regional energy projects are also part of the priority projects under RECCA and have witnessed significant progress recently:

- The Turkmenistan-Afghanistan-Pakistan-India (TAPI) natural gas pipeline project which aims to transfer up to 33 billion cubic meters (bcm) of natural gas per year through an approximately 1,800-kilometer (km) pipeline from Turkmenistan (144 km) to Pakistan (800 km) and India (90 km) through Afghanistan (735 km).

- The CASA 1000 project which is aimed at transferring 1000 MW of power from Tajikistan and the Kyrgyz Republic to Pakistan via Afghanistan and additional 300 MW to Afghanistan.

- TAP 500-KV between Turkmenistan, Afghanistan and Pakistan which seeks to export year round power to Afghanistan and Pakistan by 2020.

Similarly, an entire Confidence Building Measure (CBM) under HoA-IP is dedicated to Regional Infrastructure covering energy infrastructure, railway infrastructure, road infrastructure, electric power infrastructure, socioeconomic infrastructure as well as mining industry.

ICT sector has been among the most vibrant and successful sectors in the country. Around 23 million people have access to mobile phone, and over 8.5 million people have access to the Internet. The fiber optic network with a total of 4218 kms has been extended in the country and has been connected with five neighboring countries (Tajikistan, Uzbekistan, Turkmenistan, Iran and Pakistan) in seven points. The work is underway to connect the network to the Chinese fiber optic network.

An increasing number of government agencies, universities and customs have been connected to the fiber optic network. With a view to further develop the ICT infrastructure and broadband system and encourage private sector investment, the ICT Policy and the Open Access Policy have been developed and a number of licenses have been issued for the private sector. This along with the creation of internet exchange centers will significantly reduce of the cost of internet and increase its quality in the country.

The government of Afghanistan has made considerable efforts towards customs modernization and automation. The newly developed 5-year ACD strategic plan has made special focus on the automation and includes the use of transit tracking system and modernization of border crossings as well as use of CCTV.

The establishment of Special Economic Zones (SEZs) / Multimodal Transport and Logistics Facilities has also been pursued under RECCA in collaboration with the MoF and the Afghanistan Airfield Economic Development Commission (AAEDC)

Despite the efforts and achievements, however, infrastructure financing remains a major challenge for Afghanistan. The efforts in this context have been directed towards diversification of fund mobilization, attracting capital and investment from diverse private sector and public sources including the Sovereign Wealth Funds, new regional funds and investment banks as well as innovative financing modalities such as PPP and power purchase agreements. The government has made considerable efforts to develop model bankable projects for replication across a number of key sectors including for example,

power generation and multi modal inland ports. The Public Private Partnership (PPP) Policy was developed in 2015 followed by the development and entering into force of PPP Law in 2016 which aims to regulate issues relevant to Public-Private Partnership on the basis of the principles of transparency, open competition, and cost-effectiveness; identify the opportunities for joint investment by Public-Private sectors; provide the opportunity for utilizing efficiently the public estates, assets, capacities, expertise and technology in the private sector; encourage private investment for carrying out the Public Private Partnership projects; ensure availability of funds for infrastructural projects and provision of public services; facilitate efficient and swift economic and social development and ensure public interests. A Directorate General on PPP has been established under the Ministry of Finance (MoF) to oversee the implementation of PPP Law and Policy and to help prioritize and develop PPP projects.

The government has also made efforts including under RECCA and HoA-IP to connect businesses across the region, foster a range of business support and regional trade and investment promotion activities, joint ventures and other kinds of B2B partnerships with a view to promote investment in regional cooperation and investment projects as prioritized under the two frameworks.

Cross-border physical infrastructure development in the areas of transport, energy and ICT has to be complemented by the development of soft infrastructure required for regional integration including improved regulatory regimes and border clearance procedures as well as policy integration and coordination which can further reduce the costs of trade. Improving transport and logistics facilities remains important in this regard.

There is also need for greater synergy and complementarity at different levels: 1) between regional and sub-regional economic cooperation initiatives with respect to their infrastructure development component; 2) between various transport corridors in the wider region and 3) among transport, energy and ICT sectors under integrated economic corridors which offer greater opportunities for increased efficiency.

Furthermore, information and knowledge sharing by countries with good experience as well as by regional and international organizations including International Financial Institutions (IFIs) is essential in ensuring successful PPPs in support of infrastructure development in Afghanistan.

International Trade and Trade Facilitation

Trade is one of the main drivers of growth in Afghanistan, holding considerable promise for the country. Afghanistan stands to gain from increasing the volumes and distribution of its trade. By increasing the exportability of its primary products, growing trade volumes are expected to benefit Afghan development in four primary ways: (i) increasing government revenue; (ii) increasing overall GDP growth; (iii) increasing growth of the energy, mineral, and agricultural sectors; and (iv) increasing the growth of the service sector. Therefore, dynamic gains from trade can be expected to result in substantial increases in economic growth, job creation, public revenue, and the overall standard of living, all stemming from increasing Afghanistan's integration in its regional and the wider world economy.

According to the World Bank, fully USD \$5.2 billion in traded goods could be transited through Afghanistan on a yearly basis, including gains of up to 5% of the value of total transit trade or the equivalent of USD \$260 million (October, 2016).

As a result of efforts by the government of Afghanistan supported by regional and international partners, the number of trade routes through Central Asia, South Asia, and Iran have been increasing, diversifying the movement of goods to and from Afghanistan.

Afghanistan's trade structure is now less concentrated in terms of the number of its trade partners than it was in the previous decade. Afghanistan's immediate neighbors represent over 50% of Afghanistan's total trade volume. In 2018, Afghan trade volumes between Afghanistan and its top trade partners rank as follows: Iran at \$1,2 billion USD, Pakistan at \$1,4 billion USD, China at \$1,1 billion USD, Turkmenistan at \$386 million USD, and Kazakhstan at \$795 million USD. In terms of exports, some of the top export destinations of Afghanistan are India (USD \$359 million), Pakistan (USD \$378 million), and Iran (USD \$19.5 million).

In order to increase Afghanistan's private-sector led export-oriented growth and decrease its dependency on foreign aid, Afghanistan has placed a special focus on negotiating bilateral and regional trade and transit agreements. This would increase not only the volume of its traded goods, but also the volume of goods transiting through Afghanistan. At present, Afghanistan has bilateral trade and transit agreements with most of the neighboring and regional countries as well as multilateral transport and transit agreement such as the Lapis Lazuli Route Agreement, Chabahar Corridor Agreement, the Cross-Border Transport Agreement with the Kyrgyz Republic and Tajikistan; South Asian Free Trade Agreement (SAFTA) and the Economic Cooperation Organization Trade Agreement (ECOTA). The effective implementation of these agreements are expected to significantly reduce the average transit costs between the contracting parties. They are also expected to expand growth opportunities for production and employment as trade and transit prospects increase.

The government of Afghanistan has also embarked on various important initiatives to fully utilize its comparative advantages and unlock the export potential in its energy, mining, and agriculture sectors:

First, the government has developed its new National Export Strategy (NES) with the following 4 strategic objectives:

- Nurture the emergence of a productive, resilient private sector known for quality and innovative products;
- Foster the development of a conducive business and investment climate;
- Enhance in-market support and strengthen enterprise capabilities to harness information and market intelligence
- Support state- and peace-building through inclusive and equitable economic growth

The six priority sectors under NES include dried fruits and nuts, fresh fruits and vegetables, saffron, carpet, marble and granite, precious stones and jewelry.

Second, the Afghanistan National Trade Policy (ANTP) has been developed with a view to “expand Afghan exports and domestic production that leads to economic growth, creation of jobs and poverty reduction, thereby reducing the trade deficit, by facilitating trade and promoting export opportunities and market access, developing competitive businesses and industrial sectors catering for the domestic market, building the capacity of the Ministry of Industry and Commerce (MoIC) and trade support institutions, and strengthening the trade enabling business environment...it provides an evidence-based, structured and coherent approach to enhance Afghanistan’s trade competitiveness and benefit from the increasing insertion into the global economy.”

The ANTP includes the following six policy areas:

- Promoting export competitiveness of Afghan products by addressing supply-side constraints;
- Promoting domestic production and trade;
- Enhancing the tariff regime;
- Increasing the efficiency of import and export administration, customs and border-control measures;
- Promoting market access for Afghan goods and services;
- Making trade enhancing institutions more effective

Third, the government has developed and implemented the Private Sector Development (PSD) NPP with the following four key components:

- Restoring confidence and creating an enabling environment for businesses.
- Increasing access to key inputs for business.
- Sharing risks and crowding in investment.
- Facilitating and securing trade and transit.

And lastly, Afghanistan became a member of the World Trade Organization (WTO) in July 2016, after completing an accession process which began in November 2004. WTO membership provides a major opportunity for Afghanistan to strengthen economic ties and expand opportunities for trade with countries in the region and with the entire world. The Government has developed a post-accession strategy with a view to actively utilize the rights and benefits of full membership in the WTO and to attract investment, create jobs and improve the economic welfare of all Afghans. Efforts will continue to undertake the required reforms and amendments to trade-related laws and regulations.

Regional Integration and Cooperation

As studies suggest, regional economic cooperation and integration remains a key driver of improved connectivity and competitiveness, greater productivity, lower transaction costs and expanded markets and can accelerate and diversify economic growth. In the case of Afghanistan, regional cooperation and integration remains key in addressing the challenges associated with landlockedness, as well as in utilizing the benefits of Afghanistan's centrality as a regional land-bridge.

Regional economic cooperation has, therefore, remained an important pillar of Afghanistan's foreign policy and an important component of the national development strategy. The vision of the government of Afghanistan, in this context, is to restore Afghanistan's historical role as a land-bridge and a convergence point between Central Asia, South Asia, China, the Middle East, and Europe, in order to achieve greater regional cooperation and integration for the benefit of peace and prosperity in the wider region.

The government of Afghanistan has pursued this vision under two major Afghanistan-centered regional cooperation platforms: RECCA and HoA-IP.

RECCA was established in 2005 as the first Afghanistan-centered regional cooperation framework aimed at promoting regional economic cooperation through a list of prioritized regional economic cooperation and investment projects that are capable of contributing to economic growth, job creation, income generation and confidence building in the wider Central, South and Southwest Asia and beyond. RECCA currently covers around 20 regional priority projects under six major clusters: Energy, transport networks, trade and transit facilitation, communications, business-to-business partnership and labor support, and research collaboration.

Seven ministerial meetings of RECCA have so far been held in Kabul and major capitals across the region. From 14-15 November 2017, the Seventh RECCA meeting was convened in Ashgabat, Turkmenistan under the theme of "*Deepening Connectivity and Expanding Trade through Investment in Infrastructure and Improving Synergy*" bringing together high-level delegations from some 67 countries and international organizations. RECCA is expected to become the principal platform for FDI, trade and transit, and infrastructure development in the region. RECCA's new approach places a special focus on the bankability of regional projects and their effective implementation. The most recent initiatives under RECCA include the establishment of a RECCA Chamber of Commerce and Industries (RCCI), a RECCA Center for Research and Evaluation (RCRE), and a Women's Economic Empowerment Initiative (WEEI). In the second decade of RECCA, it seeks to be a comprehensive platform for economic integration and commercial exchange, increasingly owned and operated by the people, businesses, and governments of Central, South and South West Asia and beyond. The Eight Ministerial Meeting of RECCA will take place in the second half of 2019 in Tashkent, Uzbekistan.

The HoA-IP is another important Afghanistan-focused regional cooperation platform which was founded in November, 2011, providing a platform for results-oriented regional cooperation by placing Afghanistan at its center, in recognition of the fact that a secure and stable Afghanistan is vital to the prosperity of the Heart of Asia region. HoA-IP is an important platform for enhancing dialogue and building trust among regional countries. The HoA-IP promotes regional political, security, and economic cooperation with the goal of building peace, stability, and prosperity in Afghanistan and the entire region. HoA-IP has three main pillars: 1) Political Consultations, 2) Confidence Building Measures (CBMs), and 3) Cooperation with Regional Organizations. Whereas the primary emphasis of HoA-IP is on political and security issues, the primary emphasis of RECCA is on economics and finance.

The following six priority areas have been prioritized as CBMs under HoA-IP:

1. Counter-terrorism CBM (led by Afghanistan, Turkey and UAE);
2. Counter-narcotics CBM (led by Azerbaijan and Russian Federation);
3. Regional Infrastructure CBM (Azerbaijan and Turkmenistan);
4. Trade, Commerce and Investment Opportunities CBM (led by India);
5. Disaster Management CBM (led by Kazakhstan and Pakistan); and
6. Culture and Education CBM (led by Iran)

A new CMB on Agriculture Development was also recently proposed and endorsed under HoA-IP. Seven Ministerial Meetings of HoA-IP have been held and hosted by Turkey in 2011, Afghanistan in 2012, Kazakhstan in 2013, China in 2014, Pakistan in 2015, India in 2016 and Azerbaijan in 2017. Currently, Turkey is the co-chair and the 8th Ministerial Meeting will take place in the first half of 2019 in Istanbul.

Afghanistan is also party to major regional cooperation platforms in the wider region including the South Asian Association for Regional Cooperation (SAARC), Economic Cooperation Organization (ECO), United Nations Special Programme for the Economies of Central Asia (UNSPECA), and the Central Asia Regional Economic Cooperation (CAREC) program.

Both RECCA and HoA-IP promote Afghanistan's active participation in these regional organizations. Both platforms are making efforts to harness the role of regional and international partners by supporting or complementing efforts made under these organizations. Both have sought to actively encourage a convergence in approaches on shared priorities with other regional organizations and initiatives. Following an initial meeting of the heads of the secretariats of regional organizations to which Afghanistan is a member in 2010 in Kabul, a second such meeting was convened on the sidelines of RECCA-VI in 2015 in Kabul.

The collective regional efforts under RECCA, HoA-IP and other regional platforms have helped regional economic cooperation take root, paving the way for concrete and tangible cooperation in a wide range of areas, including energy, transport networks, trade and transit facilitation, communications, business-to-business partnerships, and labor support as well as confidence building in important areas such as counter-terrorism and counter-narcotics. Afghanistan and the wider region have witnessed inspiring achievements over the past two years in the area of regional economic cooperation and integration, exemplified by an expanding network of pipelines, transmission lines, and fiber optic cables, as well as by the finalization of important transport and transit agreements and the operationalization of freight trains and air cargo corridors across the region.

Structural Economic Transformation

The ANPDF which outlines Afghanistan's plan to achieve self-reliance and increase the welfare of people is aimed at building a productive and broad-based economy that creates jobs and generates income. Afghanistan's vision under the ANPDF includes changing "the structure of our economy from one of import and distribution to one where a thriving private sector – from small farmers and urban businesses to large manufacturers – can successfully export Afghan products to regional and global markets." It also focuses on making "strategic investments in infrastructure, human capital, quality service delivery, and technology; backed by a robust and well-regulated financial sector that can channel money to where it can best be spent." According to this vision, "growth will be inclusive and balanced. As the economy grows, Afghanistan will be able to expand investments in the health and education of the people. Achieving these goals requires a collective effort to overcome fragmentation, increase accountability, and introduce proper policies for sustainable growth."

The following NPPs which cover important priority areas are expected to contribute significantly towards the realization of this vision:

- The National Infrastructure Plan (2017-2021) which aims to improve infrastructure development and maintenance in the areas of transport and connectivity, energy, telecommunications, water and irrigation.
- The Comprehensive Agricultural Development Program (2016-2021) aims to increase agricultural productivity and exports; and improve food security. As an important pillar under this program, the Agribusiness Charter aims to address the required reforms at both policy and institutional levels as well as access to finance and agro-industrial development, with a view to boost growth and increase investment and exports.
- The Citizens' Charter (2017-2027) aims to contribute to poverty reduction including through the delivery of a basic package of services to all communities which includes access to clean drinking water, quality education, basic package of health services as well as small-scale rural and urban infrastructure.
- The Private Sector Development Program (2018-2023) aims to encourage private sector investment and participation by creating an enabling environment for businesses.
- The Ministry of Mines Reform Strategy (2018-2025) aims to ensure the sustainable development of natural resources and extractive industries including through improving the policy and institutional frameworks.
- The Human Capital Development Program (2019 to 2023) aims to help build and sustain productive human capital in Afghanistan through providing universal and quality health care services; developing and implementing outcome-based and standardized education programs including market-driven higher education and training programs; as well as efficient and effective social protection programs.
- The Women's Economic Empowerment Program (2017-2027) aims to improve women's access to economic resources and opportunities through increasing the availability and analysis of gender statistics; removing legal barriers to women's participation in economic activities; training in literacy, business management, and labour skills; ensuring inclusive access to finance; improving access to agricultural inputs, extension services, and markets; and promoting access to creative economy markets.
- The Urban Development Program (2016-2025) aims to improve urban economies, business environment, infrastructure and housing, while strengthening urban governance and urban-rural linkages.

Other NPPs such as the Effective Governance Program (2019 to 2024) and the Justice Sector Reform Program (2017-2021) are also expected to contribute to the implementation of the abovementioned NPPs and the realization of the government's vision under ANPDF.

Furthermore, as mentioned above, with a view to capture domestic market and promote export, the Ministry of Economy has developed a domestic production led growth policy: "Towards Productive Afghanistan, which focuses on top import and export items to improve the current trade imbalance of the country. The work on a labor mobility strategy is also underway by the Ministry of Labor and Social Affairs (MoLSA).

The implementation of the National Trade Policy, National Export Strategy as well as priority regional cooperation and investment projects as pursued under RECCA and HoA-IP will significantly contribute to the realization of our vision for structural economic transformation as outlined under ANPDF.

Agriculture remains an important sector in the context of economic transformation in Afghanistan. The Ministry of Agriculture, Irrigation and Livestock (MoAIL) under the comprehensive agricultural development NPP and its sectoral strategy has placed a special focus on the improvement of technology in agriculture, creativity, diversification of agricultural activities as well as competitiveness and market access in the sector.

Value chains development is also an important component under the National Horticulture and Livestock Program (NHLP) and other projects. In this context, private sector investment in livestock farms, agriculture farms as well as in building processing and packaging centers, cold houses and storages has been encouraged.

The MoAIL has undertaken a series of initiatives to promote job creation in the sector. For example, the saffron value chain is currently creating job for nearly 5000 people a year and saffron production has increased by 78%. The MoAIL has also initiated the Agriculture Development Fund (ADF) which provides loans for farmers.

Tourism has the potential to create a significant amount of job and thus contribute to economic growth in the country. The office of Deputy Minister for Tourism which operates within the Ministry of Information and Culture has developed the National Policy for Tourism and the draft five-year plan for tourism promotion in the country. The ministry has made efforts to encourage private sector investment and participation in tourism promotion activities including in hotel management, establishment of tourism services companies as well as restoration and renovation of historical sites and national parks.

With a view to improve efficiency and productivity, the government of Afghanistan has increasingly invested in technology and innovation in key sectors including in the education and health sectors. In order to ensure education for all children, the Ministry of Education has developed and implemented a distance learning program through the Education Radio and TV. The ministry has distributed laptops among students in a number of schools as well as tablets among the ministry staff at the provincial and district levels for collecting and reporting statistics to the central departments. Other efforts by the ministry in this regard include the establishment of IT laboratories, databases, video conference facilities, and internet centers in an increasing number of schools across the country. The ministry has also encouraged private sector investment in education which includes the issuance of licenses for private schools

The Ministry of Higher Education has also made considerable efforts to promote ICT in the higher education system which include the establishment of ICT centers in major universities across the country; the extension of fiber optic to 32 universities and academic centers with a view to provide high speed and cheap internet as well as establishment of online education.

Means of Implementation

As part of the efforts to improve equitable access to quality health services for all, the Ministry of Public Health (MoPH) has initiated the use of certain innovations and technologies in the sector including telemedicine technology; geo-location monitoring; digital medical record system; digital technology use for awareness and patient satisfaction and feedback; high-tech quality control system for pharmaceuticals; family health housed model; mobile health program; increase access and quality of Maternal Health & Newborn Care Services by using innovative demand and supply side approaches; Golden Villages where communities commit to child health, nutrition, education and protection outcomes as well as smart paper technology; blood donation mobile application & blood bank information system, e-Health.

The government of Afghanistan has made efforts to utilize all the resources available effectively to implement the global development agenda at a national level.

First, as mentioned above, with a view to incorporate the A-SDGs into the budget process and development planning at the national and sub-national levels, the 17 goals have been divided into 8 national sectors and 17 sub-sectors. With a considerable increase in domestic revenues over the past three years, the share of domestic resources in funding the development budget has increased.

Second, despite the fact that international aid to Afghanistan has been declining over the past few years, official development assistance continues to play an important role in funding the development budget in Afghanistan which includes among others, the priority areas of VPOA. Bilateral donors, United Nations (UN) and its specialized agencies and programs, European Union (EU), International Financial Institutions (IFIs) such as the World Bank, Asian Development Bank and the Islamic Development Bank; new investment banks; sovereign wealth funds as well as regional cooperation organizations are among Afghanistan's major development partners. Aid effectiveness and predictability remains an important factor in ensuring that ODA is well aligned behind national priorities and needs.

Third, given the declining aid and continued investment deficit particularly with respect to infrastructure development, the government of Afghanistan has placed a special focus on investment promotion including Foreign Direct Investment (FDI) and investment by the domestic private sector. As mentioned above, the efforts in this context have been directed towards diversification of fund mobilization, attracting capital and investment from diverse private sector and public sources including the Sovereign Wealth Funds, new regional funds and investment banks as well as innovative financing modalities such as PPP and power purchase agreements. The government has made considerable efforts in accordance with the PPP Law and Policy to develop model bankable projects for replication across a number of key sectors. In this context, a number of energy projects have been awarded to domestic private companies and joint ventures which include a 52 MW Mazar gas to power project with Ghazanfar Company (\$75 million); the 50 MW Sheberghan gas-based power project with Bayat Energy; the 30 MW Kandahar solar power project with 77 Construction Company (\$47.3 million); and the 10 MW solar power project awarded to an Indian/ Afghan company.

Furthermore, as part of the efforts to simplify the procedures, the cost of obtaining a business license has been reduced from \$440 to \$1 and a one-stop shop has been opened in Kabul and 16 other provinces where investors can obtain all permits. Investors can now also receive their visas on arrival.

At an institutional level, the Executive Committee on Private Sector Development has been established and a high-level board for the protection of foreign investment is also being created which are expected to further increase private sector investment in the country.

Monitoring of Implementation and Review

With a view to better coordinate and facilitate South-South and triangular cooperation in support of the implementation of A-SDGs and other development agendas including VPoA, South-South cooperation has been recently incorporated in the work of the Executive Committee on SDGs.

Various bilateral, regional and multilateral cooperation and coordination mechanisms exist between Afghanistan and its regional and international partners which, among other activities, contribute to information sharing and facilitation of development cooperation and relevant opportunities.

As mentioned earlier, Afghanistan is party to many regional cooperation platforms which provide valuable opportunities for information sharing on and exchange of capacities, resources, expertise and knowledge that exist in the member states in achieving sustainable development objectives. Particularly, RECCA and HoA-IP as two prominent Afghanistan-centered regional cooperation platforms have played an important role in facilitating South-South and Triangular Cooperation..

The Economic Cooperation Department within the Ministry of Foreign Affairs of Afghanistan has been in charge of facilitating and coordinating issues related to the implementation of VPoA. As mentioned above, in order to ensure greater synergy and coherence among various global development agendas at a national level, VPoA has been recently incorporated into the work of the Executive Committee on SDGs which will include the utilization of the Executive Committee as a national mechanism for coordination, monitoring and reporting including data collection and analysis on this program of action. The preparation of the current country report in collaboration with the SDGs Executive Committee is the first practical step in this context. Bringing coherence and synergy in this context is expected to facilitate the mainstreaming of the VPoA into National Development Plan.

In the context of broader aid management, several coordination mechanisms exist for high-level review and follow-up regarding the implementation of the mutual commitments between the international community and Afghanistan including the Joint Coordination and Monitoring Board (JCMB), the Senior Officials Meeting (SOM), the Heads of Agency (HOA) and the international conferences on Afghanistan which are held every two years with a facilitating role played by the Ministries of Foreign Affairs and Finance of Afghanistan.

Conclusion and the Way Forward

Despite the efforts and progress made in Afghanistan in achieving development objectives including the priority areas under VPoA over the past few years, there are still challenges facing the country including infrastructure gaps, investment deficit and various forms of trade and transit barriers. In order to overcome these challenges, an integrated approach and more intensive efforts are required at different levels:

First, infrastructure development including in the areas of transport, energy and ICT remains an important priority under the development strategy of Afghanistan. Both Afghanistan and the surrounding region are facing huge infrastructure gaps which need to be addressed collectively and under an integrated approach. Addressing the investment needs for infrastructure development should therefore remain a top priority at all national, regional and international levels including within the LLDCs group. The government of Afghanistan is of the view that there should be collective efforts to encourage multilateral financial and development institutions and regional development banks to establish dedicated infrastructure funding for the LLDCs. In the case of Afghanistan, the existing mechanisms and funds for infrastructure development must be further strengthened and synergy among them must be further improved. There is also need for strengthened technical assistance programs by the UN system, IFIs and development partners as well as for sharing experiences and

best practices among LLDCs regarding infrastructure development including infrastructure financing.

Second, value chains development and market access remain crucial for the economic development of Afghanistan. Afghanistan needs to be further supported towards its integration into regional and global value chains with a view to expand its export markets and diversify its export baskets. In this context, free and unrestricted transit for Afghanistan through transit countries remains crucial and more intensive efforts need to be made at a regional level to implement the existing trade and transit agreements effectively. A special focus in this context should be placed on soft infrastructure including removing all forms of trade and transit barriers. Accession to those international conventions and legal instruments that contribute to harmonization and reduction in transit cost and time should be accelerated by the transit countries. As a new member of WTO, Afghanistan needs enhanced provision of technical, financial, and capacity-building support in the implementation of its post-accession strategy.

Third, regional economic cooperation remains a key driver of economic development in Afghanistan and the wider region and can significantly contribute to the realization of development objectives under VPoA through improving connectivity and competitiveness, increasing productivity, lowering transaction costs and expanding markets. RECCA and HoA-IP continue to play an instrumental role in promoting regional cooperation in the wider region including with respect to priorities under VPoA. Both platforms need to receive greater support from regional and international partners.

Fourth, to avoid duplication of efforts and share resources, there is need for bringing greater synergy at different levels: 1) between regional and sub-regional economic cooperation initiatives, 2) between various transport and transit corridors in the wider region, and 3) among transport, energy and ICT sectors.

Fifth, Afghanistan needs long-term support in its efforts towards fostering its productive capacities as outlined under ANPDF, NPPs, NES and ANTP and other policy documents.

Sixth, given the declining aid and investment deficit in Afghanistan, both aid effectiveness and greater reliance on private sector investment remain crucial for the country. On aid effectiveness, there is need for greater alignment of international assistance behind national development objectives as prioritized under ANPDF, NPPs, A-SDGs and VPoA. Increased on-budget support remains essential in this context. On investment promotion efforts, the focus needs to be directed towards diversification of fund mobilization attracting capital and investment from diverse private sector and public sources including the sovereign wealth funds, new regional funds and investment banks as well as innovative financing modalities such as public-private partnership.

Lastly, policy dialogue and coordination as well as research collaboration among land-locked developing countries and transit countries in collaboration with international development partners is essential. The International Think Tank (ITT) for LLDCs, as well as the newly established RCRE can play an important role in this regard.

Abbreviations

A-SDGs	Afghanistan Sustainable Development Goals
AAEDC	Afghanistan Airfield Economic Development Commission
ACAA	Afghanistan Civil Aviation Authority
ACD	Afghanistan Customs Department
ANPDF	Afghanistan National Peace and Development Framework
ANTP	Afghanistan National Trade Policy
CAL	Civil Aviation Law
CAREC	Central Asia Regional Economic Cooperation Program.
CASA	Central Asia – South Asia
CBM	Confidence Building Measure
CMAA	Customs Mutual Administrative Assistance Agreement
ECO	Economic Cooperation Organization
ECOTA	Economic Cooperation Organization Trade Agreement
EGMs	Expert Group Meetings
ERDA	Energy for Rural Development Afghanistan
GMAF	Geneva Mutual Accountability Framework
HOA	Heads of Agency
HoA-IP	Heart of Asia – Istanbul Process
IDPs	Internally Displaced People
IFIs	International Financial Institutions
IPoA	Istanbul Program of Action
JCMB	Joint Coordination and Monitoring Board
MoAIL	Ministry of Agriculture, Irrigation and Livestock
MoE	Ministry of Economy
MoF	Ministry of Finance
MoIC	Ministry of Industry and Commerce
MoLSA	Ministry of Labor and Social Affairs
MoPH	Ministry of Public Health
MRRD	Ministry of Rural Rehabilitation and Development
NES	National Export Strategy
NHLP	National Horticulture and Livestock Program
NIP	National Infrastructure Plan
NPPs	National Priority Programs
PPP	Public Private Partnership
PSD	Private Sector Development
RECCA	Regional Economic Cooperation Conference on Afghanistan
SAARC	South Asian Association for Regional Cooperation
SAFTA	South Asian Free Trade Agreement
SEZs	Special Economic Zones
SOM	Senior Officials Meeting
TAPI	Turkmenistan-Afghanistan-Pakistan-India
UNESPECA	United Nations Special Programme for the Economies of Central Asia
VPoA	Vienna Program of Action
WTO	World Trade Organization

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