The Afghanistan Lithium Great Game

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While the United States, along with its allies, left Afghanistan in August 2021 in spectacularly humiliating circumstances, the departure was never entirely complete, nor bound to be permanent. Since then, Washington has led the charge in handicapping those who, with a fraction of the resources, defeated a superpower and prevailed in two decades of conflict.

In a fit of wounded pride, the United States has, in turn, sought to strangulate and asphyxiate the Taliban regime, citing human rights and security concerns. The Taliban's Interim Foreign Minister, Mawlawi Amir Khan Muttaqi, makes the not unreasonable point that "the ongoing crisis is the imposition of sanctions and banking restrictions by the United States."

In May this year, Idaho Republican Senator Jim Risch, ranking member of the Senate Foreign Relations Committee, led 18 of his righteous colleagues in introducing the Taliban Sanctions Act, promising more chastising. Ostensibly, the Act seeks to impose "sanctions with respect to terrorism, human rights abuses, and narcotics trafficking committed by the Taliban and others in Afghanistan."

The brief for prosecuting an even more aggressive stance against the Taliban never ceases to bulk, be it to arrest the mistreatment of women and their inexorable marginalisation, or the claim that the country is now essentially a bandit state which is both a danger to itself and its neighbours. "Over a year into Taliban rule, breakdown of the state, bankruptcy of financial institutions, economic collapse and diplomatic isolation have pushed Afghan society to the brink of humanitarian catastrophe," writes a former senior advisor to Afghanistan's Foreign Minister, Arian Sharifi, currently an academic at Princeton University's School of International Affairs.

Sharifi goes on to analyse the Taliban in what resembles a portrait of the ramshackle government he served. "The Taliban today is deeply divided, making it unable to pursue a unified course of action." They also ruled a country with "more than 20 terrorist groups with a long-standing presence in Afghanistan."

In typical good taste, Sharifi delicately ignores his role in having advised a corrupt government whose strings were firstly pulled, then abandoned, by Washington and its allies. His poisonous pen fails to acknowledge the attempt by his own past sponsors to systematically contribute to that very failure, bankruptcy and ruin. He can, however, take some hope in recent reports suggesting that Afghanistan will again become a playground for what British imperialists dubbed in the 19th century the Great Game, the Anglo-Russian competition for influence over Central Asia.

In recent months, Afghanistan has again piqued the interest of eager strategists drawing their salaries from the US government and assorted think-tanks. Such interest has nothing at all to do with the good citizenry of the Taliban-controlled state, be it the welfare of women or purported links to terrorist groups. They concern the presence of lithium reserves in the Chapa Dara district of Kunar province and, almost inevitably, a fear that the People's Republic of China might muscle in.

In 2010, a US Department of Defense memorandum valued the extent of Afghanistan's mineral wealth as between $1 trillion and $3 trillion. And that was before the skyrocketing value of specific minerals that are becoming critical in the global energy transition.

As the *Washington Post* reports, the eightfold rise in the mineral's market price around the time of the Taliban takeover in August 2021 enticed "hundreds of Chinese mining entrepreneurs to Afghanistan." The paper describes in tones of awe and alarm Chinese traders filing Kabul's hotels, then making their way to the hinterlands to seek lithium reminiscent "of a 19th-century gold rush."

Foreign Policy columnist Lynne O'Donnell also points an accusing finger at China for yet again "mucking about in Afghanistan's mineral-rich playground." Doing so is evidently the prerogative of Western states. She mocks the suggestion that this move in the energy transition stakes might "mean that billions of dollars will be pouring into securing a prosperous future for one of the world's poorest countries. It probably won't." Remarkably, China is reproached for treating the country as a political, rather than economic matter.

The interest in such minerals is bound to only grow; the International Energy Agency, predicts that the growth in demand for lithium by 2040 will be by a factor 40 times, with graphite, cobalt and nickel in the order of 20-25 times.

The *Post* also seems troubled by another fact: that the Taliban have woken up to the value of lithium, and its vital role in the manufacture of Electric Vehicles (EVs) and battery storage. (How dare they?) "The tremendous promise of lithium […] could frustrate Western efforts to squeeze the Taliban into changing its extremist ways." The absence of the United States also meant that Chinese companies could "aggressively" position themselves to exploit the resource, thereby tightening Beijing's "grasp of much of the global supply chain for EV minerals."

In April, the Taliban's Ministry of Mine and Petroleum announced the interest of a Chinese company, Gochin, in investing $10 billion in the country's lithium deposits. According to the Ministry, some 120,000 direct jobs would arise from the investment, with a million indirect jobs being created.

Whatever the merits of such extravagant announcements (China's 2007 copper mining project valued at $3 billion failed to provide predicted returns), it was the sort of thing bound to make the Washington establishment livid. The object of the Biden administration has been to corner the rare minerals market and prize out China, best seen in efforts to classify Australia as a "domestic source" for US defence interests. Doing so would give unqualified access to the island continent's own impressive lithium reserves. (53% of the world's lithium supply is mined in Australia.)

A traditional, potentially violent rivalry over the resources of yet another country, is in the offing. Only this time, the narrative will be slightly different: the competitors, notably the United States, habitually prone to cant and hustling, will argue that the mission to secure such minerals will be less a case of manifest destiny than environmental duty. The cry will be: Save the Planet; Invade Afghanistan.

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Featured image: Archeologists excavating Buddhist relics in 2011 before the Mes Aynak copper mine was due to open (Photo: Jerome Starkey / Creative Commons)

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