



# AFGHANISTAN:

## Socio-Economic Outlook 2021-2022

**AVERTING A BASIC NEEDS CRISIS**



## ACKNOWLEDGMENTS

This first edition of the Afghanistan Socio-Economic Outlook 2021-2022 was prepared by the United Nations Development Programme (UNDP) Team in Afghanistan under the overall direction and guidance of Abdallah Al Dardari (UNDP Resident Representative in Afghanistan), and was led by Zafiris Tzannatos (Strategy and Policy consultant).

Individual sections were contributed by the UNDP Afghanistan modelling team: Adnan Mazarei (macro), Chokri Thabet (C-CGE modelling), Fawaz Sabri (private sector and banking), Michel Del Buono (energy), Renata Rubian (SDGs), Sebnem Sahin (A-GTAP CGE), Stephen Kidd (social protection), Taoufik Rajhi (C-CGE modelling) and Zafiris Tzannatos (gender).

The report has benefitted from comments from Kanni Wignaraja (UNDP Regional Director, Asia-Pacific), Andrew Rizk (Chief Financial Officer, UNDP), Stanislav Saling (Communications Specialist, UNDP RBAP), Swarnim Waglé (Chief Economic Advisor, UNDP RBAP), Surayo Buzurukova (Senior Deputy Resident Representative, UNDP Afghanistan) and Saurabh Sinha (Head of Development Policy Unit, UNDP Afghanistan).

Additional comments and inputs were provided by the UNDP Afghanistan Team: Ahmad Farin Sadiq, Ahmad Ramiz Sultani, Anisha Thapa, Etab Al Taki, Bishwa Nath Tiwari, Fazulrahim Rahim, Hiba Abd El Hamed, Najibullah Gulabzoi, Sainey Ceesay, Sayeed Farhad Zalmi, Shakeel Ahmad and Usha Rao.

The report also benefited from discussions with Anna Custers and Tobias Al Haque (World Bank), Azim Sadikov (International Monetary Fund) and Kiyoshi Taniguchi (Asian Development Bank).

This edition is based on data availability as of mid-January 2022. Preliminary analysis was first released in December 2021. Further updates will be provided through the Afghanistan Socio-Economic Outlook series, pending new data availability.

## EDITOR

Lance W. Garmer

## DESIGN

Camilo Salomon @ [www.cjsalomon.com](http://www.cjsalomon.com)

# Contents

<b>Acronyms</b>	4
<b>Executive Summary</b>	6
<b>1. Introduction and Summary</b>	10
1.1 Objective of this report	11
1.2 The social conditions in 2020 and the then-required amount of aid	11
1.3 Post-august 2021: a ‘wait-and-see’ situation	11
1.4 The initial impact of asset freeze and reduced aid on the economy	12
1.5 The impact on social conditions	13
1.6 UNDP’s projections and the prospects for humanitarian relief	13
1.7 Outline of the report and key policy proposals	15
<b>2. Multiple shocks to an already weak and deteriorating economy</b>	16
2.1 The macroeconomic situation in 2021 and the short-term outlook	17
2.2 The role the private sector and banking during the humanitarian crisis (and beyond)	20
2.3 Energy: a key sector for household welfare and production	23
<b>3. An intensifying humanitarian crisis</b>	26
3.1 Poverty has increased sharply	27
3.2 Gender: a human rights issue with significant effects on the economy and household incomes	29
3.3 SDGs: their attainment was already off course, with further derailment expected	32
3.4 Social protection: starting from nearly zero base but can make an impact	34
<b>4. Concluding remarks</b>	36
<b>Annexes</b>	38
<b>Endnotes</b>	46

## Tables

**Table 1:** Effects on household consumption from a reduction in female employment 31

**Table 2:** Three options for providing social protection transfers 35

**Table A-1:** Summary of cash transfer options 43

## Figures

**Figure A-1:** Illustration of children entering a child benefit at 0-3 years in 2022 42

**Figure A-2:** Budget required each year for three social protection options 43

**Figure A-3:** Number of direct recipients of the social protection benefits, over 5 years 44

## Annexes

**Annex 1:** The Poverty Gap 40

**Annex 2:** Social Protection: Alternative cash transfer options 41



BAMYAN, A PROVINCE  
IN CENTRAL AFGHANISTAN.  
PHOTO CREDIT UNDP

# Acronyms

<b>A-GTAP</b>	Afghanistan Global Trade Analysis Project
<b>A-SAM</b>	Afghanistan Social Accounting Matrix
<b>ABADEI</b>	Area-Based Approach to Development Emergency Initiatives
<b>ABP</b>	Area-based Programme
<b>ADB</b>	Asian Development Bank
<b>AFN</b>	Afghan Afghani
<b>ALCS</b>	Afghanistan Living Conditions Survey
<b>C-CGE</b>	Country (Afghanistan) Computable General Equilibrium
<b>CEDAW</b>	UN Convention on the Elimination of All Forms of Discrimination
<b>CO(2)</b>	Carbon Monoxide (Dioxide)
<b>COVID-19</b>	Coronavirus Disease 2019
<b>CPA</b>	Country Programmable Aid
<b>DAB</b>	Afghanistan Central Bank
<b>DABS</b>	Da Afghanistan Breshna Sherkat (energy company)
<b>DSSI</b>	Debt Service Suspension Initiative
<b>ESRA</b>	Energy Sector Regulatory Authority
<b>FAO</b>	Food and Agriculture Organization
<b>GDI</b>	Gender Development Index
<b>GDP</b>	Gross Domestic Product
<b>GHGs</b>	Greenhouse Gases
<b>HCI</b>	Human Capital Index
<b>HDP</b>	Humanitarian-Development-Peace nexus
<b>HRP</b>	Humanitarian Response Plan
<b>ICIEC</b>	Islamic Corporation for the Insurance of Investment and Export Credit
<b>ICRC</b>	International Committee of the Red Cross
<b>IDP</b>	Internally Displaced Person
<b>IELFS</b>	Income, Expenditure and Labor Force Survey (2019-2020)
<b>IEO</b>	Independent Evaluation Office (UNDP)
<b>ILO</b>	International Labour Organization
<b>IMF</b>	International Monetary Fund

<b>IOM</b>	International Organization for Migration
<b>IsDB</b>	Islamic Development Bank
<b>MDB</b>	Multilateral Development Bank
<b>MDPP</b>	Martyrs and Disabled Pension Programme
<b>MIGA</b>	Multilateral Investment Guarantee Agency
<b>MOWA</b>	Ministry of Women's Affairs
<b>MTEFF</b>	Medium-term Fiscal Framework
<b>NIS</b>	National Institute of Statistics (Afghanistan)
<b>NO<sub>x</sub></b>	Nitrogen Oxides
<b>NTMs</b>	Non-tariff Measures
<b>OCHA</b>	United Nations Office for the Coordination of Humanitarian Affairs
<b>OECD</b>	Organization for Economic Cooperation and Development
<b>OFAC</b>	Office of Foreign Assets Control (USA)
<b>PARRs</b>	Priority Areas for of Return and Reintegration
<b>RBAP</b>	(UNDP) Regional Bureau for Asia and the Pacific
<b>SDGs</b>	Sustainable Development Goals
<b>SME</b>	Small and Medium-sized Enterprise
<b>SO<sub>x</sub></b>	Sulphur Oxides
<b>TEF</b>	Transitional Engagement Framework
<b>UBI</b>	Universal Basic Income (social protection)
<b>UNAMA</b>	United Nations Assistance Mission, Afghanistan
<b>UNCTAD</b>	United National Conference on Trade and Development
<b>UNDP</b>	United Nations Development Programme
<b>UNFPA</b>	United Nations Population Fund
<b>UNHCR</b>	United Nations High Commissioner for Refugees
<b>UNICEF</b>	United Nations International Children's Emergency Fund
<b>WFP</b>	United Nations World Food Programme
<b>WHO</b>	World Health Organization
<b>WTO</b>	World Trade Organization

# Executive Summary



预览已结束，完整报告链接和二维码如下：

[https://www.yunbaogao.cn/report/index/report?reportId=5\\_11420](https://www.yunbaogao.cn/report/index/report?reportId=5_11420)



云报告  
<https://www.yunbaogao.cn>

云报告  
<https://www.yunbaogao.cn>

云报告  
<https://www.yunbaogao.cn>