

LIBERALIZATION OF UZBEKISTAN'S CIVIL AVIATION MARKET (“OPEN SKIES”): IMPACT ON ROUTE NETWORK CAPACITY AND CONNECTIVITY

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This paper examines the structural liberalization of Uzbekistan's civil aviation market between 2018 and 2026 and its measurable effect on route network capacity and connectivity. Following Presidential Decree No. UP-5584 (27 November 2018) and the subsequent corporate separation of Uzbekistan Airways from Uzbekistan Airports (October 2019), the sector moved from a single state-owned monopoly toward a multi-carrier, partially Open Skies model. Fifth-freedom traffic rights were introduced progressively at regional international airports from October 2019, expanded substantially from 1 August 2020, and reinforced by Decree No. UP-193 (27 October 2025), which sets a 2030 target of 24 million annual passengers and 200,000 annual flights. The entry of private carriers - Qanot Sharq (relaunched 2021) and Centrum Air (launched January 2023) - alongside continued dominance of Uzbekistan Airways, is analyzed against passenger-traffic and flight-frequency data from Uzbekistan Airports for 2023–2026. Tashkent International Airport's annual traffic grew from 6.8 million passengers (2023) to approximately 10.0 million (2025), a compound increase exceeding regional peers in relative terms. The reform trajectory is benchmarked against Kazakhstan's 15-airport Open Skies regime and Georgia's single-hub (Kutaisi) low-cost-carrier liberalization model. Findings indicate that route network expansion has outpaced formal connectivity metrics available in open sources, a gap the paper identifies as a priority for future indexed analysis.

Introduction. Between 2010 and the onset of reform, Uzbekistan's air transport sector expanded at approximately 2% per year under a single vertically integrated state operator, National Aviation Complex “Uzbekiston Havo Yullary,” which combined airline, airport,

navigation, and regulatory functions within one structure [1]. This concentration constrained route development: fleet renewal was slow, foreign carrier access was limited by bilateral capacity restrictions, and airport infrastructure costs remained high relative to regional peers [1]. The reform program formally began with Decree No. UP-5584 of 27 November 2018, “On measures to radically improve the civil aviation of the Republic of Uzbekistan,” which set the framework for institutional separation and market opening [2].

Institutional restructuring followed in stages. Decree No. UP-5647 of 1 February 2019 transferred aviation-safety oversight to a newly formed Civil Aviation Agency under the Ministry of Transport [3]. In October 2019, the National Aviation Complex was split into two independent limited liability companies - Uzbekistan Airways, retaining flight operations and fleet, and Uzbekistan Airports, which absorbed the country's eleven international airports (Andijan, Bukhara, Karshi, Navoi, Nukus, Namangan, Samarkand, Tashkent, Termez, Urgench, Fergana) [4]. This separation removed the structural conflict of interest between the incumbent carrier and airport infrastructure management, a precondition for genuine third-party market entry.

Traffic-rights liberalization proceeded in parallel. From 1 October 2019, an Open Skies regime using fifth-freedom rights was introduced at Karshi, Nukus, Termez, and - for foreign-citizen carriage - Bukhara, under a decree on tourism-sector development [5]. This regime was substantially widened from 1 August 2020: unrestricted fifth-freedom access was granted at Karshi, Nukus, Termez, Bukhara, Navoi, and Urgench, while Andijan, Fergana, Namangan, and Samarkand received conditional fifth-freedom rights on routes not served by designated national carriers; Navoi and Termez additionally received cargo rights up to the seventh freedom [6]. The regime was initially set for two years, through the IATA Winter 2022/2023 season, with provision for extension [6].

Market entry followed the regulatory opening. Qanot Sharq, originally certificated as a cargo operator in 1998, relaunched passenger operations in 2021, becoming Uzbekistan's first privately owned passenger carrier [7]. Centrum Air commenced operations on 18 January 2023 as a private hybrid carrier based at Tashkent [8]. Both airlines now operate scheduled international services in direct competition with Uzbekistan Airways on major city pairs, including London and, from 2026, New York JFK [9]. Most recently, Decree No. UP-193 of 27 October 2025, “On measures to regulate the conduct of state policy in the field of civil aviation,” codified sector targets through 2030: 24 million annual passengers, 200,000 annual flights, and a resident-airline fleet of 180 aircraft [10].

The resulting traffic growth is documented in Uzbekistan Airports' operational statistics. Tashkent International Airport handled 6.8 million passengers in 2023, 8.73 million in 2024 (+28%), and approximately 9.96 million in 2025 (+14%); nationwide traffic reached 12.68 million passengers over the first ten months of 2025 alone, serviced by 60 airlines, including 12 charter operators [11], [12]. These figures place Uzbekistan's reform trajectory alongside - though not directly comparable in mechanism to - Kazakhstan's 15-airport Open Skies

regime, active since 2017 and credited with enabling the low-cost carrier FlyArystan [13], and Georgia's single-hub liberalization at Kutaisi International Airport, built around a dedicated Wizz Air base since 2012 [14].

Despite this documented traffic growth, publicly available data on route network structure - available seat-kilometres, weekly frequency distribution by destination, and formal connectivity indices - remain fragmented across operator disclosures rather than consolidated in a single regulatory dataset. This paper's aim, accordingly, is to consolidate verifiable traffic, frequency, and market-entry data into a coherent assessment of how Uzbekistan's Open Skies liberalization has reshaped route network capacity and connectivity between 2018 and 2026, benchmarked against the Kazakh and Georgian liberalization models.

Aims and Objectives of the Research. The aim of this research is to assess how the phased liberalization of Uzbekistan's civil aviation market - corporate de-monopolization, fifth-freedom traffic-rights expansion, and multi-carrier entry - has affected route network capacity, service frequency, and connectivity across Uzbekistan's international airport system between 2018 and 2026, and to position this trajectory against comparable liberalization models in Kazakhstan and Georgia.

To achieve this aim, the following objectives are set:

Trace the regulatory sequence of Uzbekistan's Open Skies policy, from Decree No. UP-5584 (2018) through the August 2020 fifth-freedom expansion to Decree No. UP-193 (2025), establishing which airports gained which traffic-rights tier and when.

Quantify the entry of new carriers - Qanot Sharq, Centrum Air, and secondary operators - in terms of fleet size, destination count, and route overlap with the incumbent, Uzbekistan Airways, to characterize the shift from monopoly to oligopolistic competition.

Analyze available passenger-traffic and flight-frequency statistics for Tashkent International Airport and regional airports (2023–2026) to establish growth rates attributable to network expansion versus underlying demand growth.

Evaluate the extent to which available open-source data permit calculation of standard route-network metrics (available seat-kilometres, weekly frequency by route, connectivity index) for Uzbekistan, and identify the data gaps that currently constrain such analysis.

Benchmark Uzbekistan's liberalization outcomes against Kazakhstan's 15-airport Open Skies regime and Georgia's single-hub (Kutaisi) low-cost-carrier model, isolating which regulatory mechanisms correspond to which network outcomes.

Formulate conclusions on the relationship between traffic-rights liberalization and route network capacity growth in a small, historically monopolistic aviation market, with implications for continued market opening through 2030.

Object and Subject of the Research. The object of the research is the route network of Uzbekistan's international airport system - comprising Tashkent, Samarkand, Bukhara, Urgench, Fergana, Namangan, Andijan, Karshi, Navoi, Nukus, and Termez international

airports - together with the scheduled carriers operating within it, both incumbent (Uzbekistan Airways) and newly entered (Qanot Sharq, Centrum Air, and others). The subject of the research is the process by which regulatory liberalization - the removal of route, frequency, and carrier-designation restrictions under the Open Skies framework - translates into measurable changes in route network capacity, frequency distribution, and airport-level connectivity.

Evolution of Uzbekistan's Open Skies Policy and Market Structure. The institutional sequence separating regulatory, airport, and carrier functions is the structural precondition for any Open Skies mechanism to function, since a combined operator has no incentive to admit competitors onto its own infrastructure. Decree No. UP-5584 set this separation in motion in November 2018; by October 2019 the former National Aviation Complex had been split into Uzbekistan Airways (fleet and flight operations) and Uzbekistan Airports (the eleven-airport network, transferred as limited liability companies) [4]. Decree No. UP-5647 relocated flight-safety oversight into a dedicated Civil Aviation Agency under the Ministry of Transport the same year [3], removing a further conflict of interest between operator and regulator.

Traffic-rights liberalization followed a differentiated, airport-by-airport schedule rather than a single nationwide opening - a materially different approach from a blanket fifth-freedom grant. The October 2019 tranche (Karshi, Nukus, Termez, Bukhara) was explicitly tourism-driven, framed under a decree on tourism-sector development rather than aviation policy per se [5]. The August 2020 tranche was broader and tiered: full, unrestricted fifth-freedom rights at Karshi, Nukus, Termez, Bukhara, Navoi, and Urgench; conditional fifth-freedom rights - valid only on routes not already served by a designated Uzbek carrier - at Andijan, Fergana, Namangan, and Samarkand; and cargo rights extending to the seventh freedom at Navoi and Termez [6]. Tashkent, notably, was excluded from every tranche of this regime, meaning the capital's international connectivity growth (documented below) has occurred almost entirely through bilateral capacity negotiation and new-entrant competition rather than through Open Skies traffic rights as such. Decree No. UP-193 (27 October 2025) does not extend the fifth-freedom map but instead sets fleet- and volume-based targets for 2030 - 180 resident aircraft, 200,000 annual flights, 24 million annual passengers - and formalizes Uzaeronavigation as sole air navigation service provider [10]. The policy trajectory is therefore better characterized as regional traffic-rights liberalization paired with national market-entry liberalization, rather than a uniform Open Skies regime in the Kazakh sense.

Entry of New Carriers and the End of the Uzbekistan Airways Monopoly. Market-entry liberalization produced two active private passenger competitors to Uzbekistan Airways within a five-year window. Qanot Sharq, certificated originally in 1998 as a single-aircraft cargo operator (Ilyushin Il-76) and dormant from 2012, relaunched passenger operations in 2021 with leased Airbus A320s, becoming Uzbekistan's first privately owned

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scheduled passenger carrier [7]. By 2026 its fleet had grown to seven aircraft (A320ceo, A321neo, A330-200), serving on the order of 27–30 destinations [7], [9]. Centrum Air commenced operations on 18 January 2023 as a private hybrid carrier under Centrum Holding LLC, advertising 50-plus destinations from its Tashkent hub with a Samarkand focus city [8]. Both carriers now compete directly with Uzbekistan Airways on long-haul city pairs: as of the 2025/2026 winter season, Tashkent-London is served by Uzbekistan Airways (Heathrow, twice weekly; Gatwick, weekly) and Qanot Sharq (Gatwick, twice weekly), with Centrum Air scheduled to add Tashkent-Manchester - giving the UK four weekly Uzbekistan routes across three carriers, a configuration unavailable under the pre-reform single-carrier structure [9]. Qanot Sharq has since filed for U.S. foreign-carrier authority (October 2025) and planned a Tashkent-New York JFK service for mid-2026, again in direct competition with Uzbekistan Airways' existing JFK route [15], [16].

This entry pattern sits within a broader Central Asian re-composition of market share. Regional CAREC data place Uzbekistan Airways' share of intra-CAREC air traffic at a stable 14% in both 2019 and 2022, alongside its own low-cost subsidiary Uzbekistan Express (2% share by 2022) - indicating that, at the regional level, the new private entrants have not yet displaced incumbent share so much as captured incremental growth from newly opened routes and rising overall demand [17]. Not every entrant has survived the transition: Panorama Airways, launched in 2021 with an eight-destination network, ceased operations in 2024, illustrating that market-entry liberalization has not guaranteed carrier viability [18].

Route Network Capacity and Connectivity: Traffic and Frequency Evidence. Direct measurement of route network capacity in standard aviation-economics terms - available seat-kilometres (ASK) by carrier or route, and a formal airport connectivity index - is not published in consolidated form by Uzbekistan Airports, the Ministry of Transport, or the Civil Aviation Agency in any source accessible for this study. The analysis below therefore relies on passenger-count and flight-frequency proxies, which is a methodological constraint addressed explicitly in the following section.

Tashkent International Airport's passenger throughput rose from 6.8 million (2023) to 8.73 million (2024, +28%) to approximately 9.96 million (2025, +14%), with H1 2026 data (5.36 million, +17% year-on-year) indicating the growth rate has not yet plateaued [11], [12], [19]. Nationwide, Uzbekistan's international airports handled 12.68 million passengers over January-October 2025 (+14% year-on-year), across 60 operating airlines including 12 charter carriers - a carrier count that itself would have been structurally impossible under the pre-2019 single-operator model [12]. Tashkent alone accounted for roughly 65% of both national passenger traffic and flight movements throughout 2025, indicating that network densification, while real, remains heavily hub-concentrated rather than evenly distributed across the eleven-airport system nominally covered by Open Skies provisions.

Domestic frequency data from June 2025 illustrate network densification at the regional-airport level specifically: new scheduled service was launched connecting Samarkand-Urgench (three times weekly), Bukhara-Urgench (twice weekly), Samarkand-Bukhara (twice weekly), and Bukhara-Tashkent (twice weekly), alongside a pre-existing near-daily Tashkent-Urgench service [20]. These are point-to-point regional routes bypassing the Tashkent hub entirely - a network topology shift consistent with, though not provably caused by, the fifth-freedom provisions nominally in force at Bukhara and Urgench.

Regional Comparison: Kazakhstan and Georgia. Kazakhstan's Open Skies regime, in force since 2017 and expanded to 15 airports by October 2024 with the addition of Oral [21], is architecturally closer to a genuine nationwide model than Uzbekistan's tiered, tourism-airport-specific approach: it applies uniformly to all 15 listed airports and explicitly targets foreign low-cost entrants, five of which (SpiceJet, Thai AirAsia X, Eastar Jet, T'Way Air, Air Arabia Abu Dhabi) were incoming as of the 2025 route announcements [22]. The domestic low-cost response - FlyArystan, Air Astana's subsidiary launched 29 March 2019 - had grown its regional CAREC traffic share to 12% by 2022, versus Uzbekistan Express's 2% over the same period [17], suggesting that Kazakhstan's earlier and more uniform liberalization produced a materially larger low-cost segment within a comparable timeframe.

Georgia's model differs in kind rather than degree: liberalization was concentrated at a single secondary airport, Kutaisi, built around a dedicated Wizz Air base established in 2012 and formalized in 2016, rather than distributed across the national airport network [23], [24]. Kutaisi's growth - from under 200,000 passengers in 2013 to over 1.7 million by 2023-2025 - was driven less by traffic-rights liberalization per se than by EU visa-free travel status (2017) combined with Kutaisi's comparatively low airport charges, which made it commercially attractive to a single low-cost operator at scale [24], [25]. Uzbekistan's regional airports (Karshi, Nukus, Termez, Bukhara, Navoi, Urgench) have not attracted an equivalent dedicated foreign low-cost base despite holding formally broader fifth-freedom rights than Kutaisi did at a comparable stage - indicating that traffic-rights liberalization alone, absent a low-cost-specific fee structure or a single-carrier anchor strategy, has been insufficient to replicate the Georgian outcome.

Research Methodology. This research applies a four-stage evidence-consolidation methodology, appropriate to a policy-and-network analysis where no single regulator publishes a unified route-network dataset.

In the first stage, primary regulatory documents were identified and dated: the Presidential decrees governing institutional restructuring (UP-5584, UP-5647) and traffic-rights liberalization (the October 2019 and August 2020 Open Skies tranches), together with the most recent sector-policy decree, UP-193 (27 October 2025). Each decree was cross-checked against at least two independent secondary sources - legal-analysis publications, industry press, and official agency statements - before being treated as established fact;

where only a single source was available for a specific tier or condition, this is flagged in the text rather than presented as fully corroborated.

In the second stage, carrier-level data (fleet size, destination count, launch date, route overlap with the incumbent) were compiled for Uzbekistan Airways, Qanot Sharq, and Centrum Air from airline and industry-press disclosures, supplemented by Wikipedia infobox data cross-referenced against ch-aviation and Simple Flying reporting. Carrier-reported destination and fleet figures are treated as operator claims rather than independently verified operational data, since no third-party audit of these figures was located.

In the third stage, passenger-traffic and flight-frequency statistics were drawn exclusively from Uzbekistan Airports' own periodic press releases (as reported via Kun.uz, UzDaily, and Zamin.uz), covering full-year 2023-2025 and interim 2025-2026 periods for both Tashkent International Airport and the national network. These are the only consolidated, regularly published traffic figures identified for the sector and are treated as the primary quantitative basis of this study.

The fourth stage constitutes a methodological limitation rather than a further data-collection step: standard route-network capacity metrics - available seat-kilometres (ASK), a formal connectivity index (e.g., an IATA- or ICAO-style indirect/direct connectivity score), and route-level load factors - were sought but not located in any publicly accessible source for Uzbekistan's airports or carriers at the level of granularity this study requires. Passenger counts and published flight frequencies are therefore used as network-capacity proxies throughout the preceding sections. This substitution likely understates true capacity growth, since it does not capture aircraft-size or seat-configuration changes accompanying fleet renewal (e.g., Qanot Sharq's shift toward A321LR/XLR and A330-200 equipment), and it cannot isolate demand-driven load-factor improvement from genuine network expansion. A formal ASK- and connectivity-index-based follow-up study, contingent on access to Uzbekistan Airports' internal scheduling data or a commercial database such as Cirium or OAG, is identified as necessary future work rather than attempted here.

Conclusion

The evidence assembled in this study supports three conclusions regarding Uzbekistan's civil aviation liberalization between 2018 and 2026.

First, the reform sequence was structurally sound but incomplete in scope: institutional separation of carrier, airport, and regulatory functions (2018–2019) was a necessary precondition for market entry, but the subsequent Open Skies traffic-rights regime was applied selectively - to regional and tourism-oriented airports (Karshi, Nukus, Termez, Bukhara, Navoi, Urgench, with conditional rights at Andijan, Fergana, Namangan, Samarkand) - while Tashkent, the dominant hub accounting for roughly two-thirds of national traffic, remained outside the formal fifth-freedom framework. Network growth at Tashkent has therefore been driven by domestic market-entry competition (Qanot Sharq,

Centrum Air) and bilateral capacity negotiation rather than by Open Skies provisions as such.

Second, market-entry liberalization produced measurable competitive outcomes within a short timeframe - two viable private passenger carriers operating long-haul international routes in direct competition with the incumbent by 2023-2026 - but has not yet eroded the incumbent's regional market share, and carrier survival is not guaranteed, as the 2024 exit of Panorama Airways demonstrates.

Third, relative to regional peers, Uzbekistan's liberalization model most resembles a hybrid of the Kazakh and Georgian approaches without fully replicating either: it lacks Kazakhstan's uniform, airport-agnostic Open Skies coverage and correspondingly has not yet produced a comparably large low-cost segment (2% CAREC traffic share for Uzbekistan Express versus 12% for FlyArystan as of 2022), and it lacks Georgia's single-hub, fee-driven foreign-low-cost-carrier anchor strategy at any of its regional airports despite holding comparable or broader formal traffic rights.

The principal constraint on this and future research is data availability: the absence of a published ASK series or formal connectivity index for Uzbekistan's airports and carriers means route-network capacity claims in the existing literature - including this paper's own - rest on passenger-count and frequency proxies rather than standard aviation-economics metrics. Establishing such a dataset, whether through Uzbekistan Airports' own disclosure practice or through access to commercial scheduling databases, is identified as the most consequential next step for evaluating whether the 2030 targets set under Decree No. UP-193 (24 million passengers, 200,000 flights, 180 resident aircraft) are being met through genuine network densification or through concentration of growth at the existing Tashkent hub.

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