

Consolidation at Home, Hedging Abroad

Across Central Asia and beyond, states are tightening domestic control while diversifying external options. Power is moving, quietly but steadily, along the corridors of trade, energy, technology, and influence.

KAZAKHSTAN

UZBEKISTAN

KYRGYZSTAN

TAJIKISTAN

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KEY JUDGEMENTS

01 Domestic consolidation is accelerating across much of Central Asia.

02 The region is diversifying its partnerships, but growing geopolitical conflict is narrowing its room for manoeuvre.

03 Connectivity diversification is becoming a strategic necessity rather than an economic choice.

“ *The region is not choosing sides. It is building options.* **”**

REGIONAL TRAJECTORY ASSESSMENT

Consolidation at Home, Hedging Abroad

Central Asia is entering a phase defined by two intersecting dynamics: internal consolidation of presidential systems and a rapidly tightening external geopolitical environment.

Internally, governments across the region are consolidating presidential authority. This is happening through deliberate institutional redesign: reconfiguring parliaments, managing elite networks, and adjusting legal frameworks to reduce uncertainty within ruling systems.

Power consolidation is never a novelty in Central Asia. Yet, the current cycle is notable

for its simultaneity and ambition. Kazakhstan is rewriting its constitution; Kyrgyzstan has just removed its most powerful security figure; Uzbekistan continues incremental adjustments to its post-Karimov institutional architecture. In all three cases the trajectory points toward tighter executive control, with political pluralism, institutional checks, and liberal norms progressively narrowed.

Externally, the environment that has long enabled Central Asian balancing strategies is deteriorating fast. The US-Israel war with Iran, which began on 28 February, is a major hot conflict unfolding in a region central to Central Asia's external connectivity. It has

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SNAPSHOT
MARCH 2026

COUNTRY	STABILITY	ECONOMIC RESILIENCE	GOVERNANCE	STRATEGIC AUTONOMY	CONNECTIVITY
KAZAKHSTAN					
UZBEKISTAN					
KYRGYZSTAN					
TAJIKISTAN					
TURKMENISTAN					

Current position
 Strong Mixed Constrained

12-18-month trajectory
 Improving Stable Deteriorating

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already disrupted trade corridors and heightened risks, ranging from supply disruptions to geopolitical escalation. Multi-vector diplomacy remains the region's default posture, but the space in which it operates is narrowing in real time.

The interaction between these dynamics produces a paradoxical effect. The deteriorating external environment is, for now, a permissive condition rather than a disruptive one. The erosion of Western normative leverage, the preoccupation of major powers with conflicts elsewhere, and the apparent unravelling of the rules-based order that once generated external pressure on governance all reduce the costs of domestic consolidation. Sovereignty-oriented constitutional provisions are easier to defend when the international order itself

looks predatory. Centralized control is easier to justify when genuine external threats exist. Central Asian governments are consolidating during a moment when the actors most likely to object are least positioned to do so.

The harder question is where this leads. External instability that currently provides cover will, at some threshold, begin generating domestic costs — through trade disruption, inflation, or great power demands that cannot be managed quietly. The question this brief tracks is when the permissive external environment shifts into a genuinely disruptive one, and whether the consolidated institutional architecture being built now will absorb that pressure or amplify it.

SIGNALS IN FOCUS

Several recent developments illustrate how these structural dynamics are unfolding in practice across Central Asia. Three signals are particularly revealing.

Kazakhstan Moves Toward a Redesigned Presidential System

On 11 February, President Kassym-Jomart Tokayev called a nationwide referendum on a new constitution to be held on 15 March. The final draft was released the following day, giving voters just over a month to assess a document that revises most of Kazakhstan's constitutional framework. The compressed timeline marked the beginning of the country's second constitutional referendum in four years and signals another stage in the ongoing redesign of Kazakhstan's political system.

The proposed constitution introduces several structural changes. The existing bicameral parliament would be replaced by a unicameral legislature (Kurultai) elected

entirely through party-list proportional representation, reversing the mixed electoral system introduced in 2022.

The draft also creates the office of vice-president, with authority to be defined by the president. These changes formally reorganize the institutional architecture while preserving strong presidential leverage across key appointments and allowing the president to dissolve parliament if it repeatedly refuses to confirm presidential nominees. The result is likely to be a more structured presidential system, rather than a redistribution of political authority among branches of government.

Several provisions also point to a broader sovereignty-oriented legal shift. The draft removes the explicit constitutional priority previously granted to ratified international treaties over domestic law, introduces tighter provisions related to foreign-linked funding and citizenship, and expands the legal grounds under which certain freedoms may be restricted. Taken together, these measures suggest a political system seeking greater regulatory autonomy and internal control over political and civic space.

The referendum also reflects a wider regional pattern. Across Central Asia, governments have increasingly sought to reinforce executive authority while redesigning institutional frameworks in ways

that help manage elite competition and reduce uncertainty within political systems. Kazakhstan's constitutional overhaul appears consistent with this broader trajectory of controlled institutional redesign under strong executive leadership.

WHAT TO WATCH

If adopted, the new constitution will enter into force on 1 July 2026, triggering elections to the new Kurultai within two months. The transition period — including parliamentary elections and a subsequent round of key institutional appointments — will provide the first practical test of whether the redesigned architecture produces meaningful institutional redistribution or reinforces Kazakhstan's presidency-centred political model.

Kyrgyzstan's Elite Reshuffle Tests Presidential Control

On 10 February, Kyrgyz President Sadyr Japarov dismissed Kamchybek Tashiev from his position as head of the State Committee for National Security, marking one of the most consequential shifts within the ruling elite since the current political system consolidated after 2020.

Tashiev was not only the country's most powerful security chief but also Japarov's closest political ally and co-architect of their rise to power. For several years the two operated as a de facto duumvirate, combining presidential authority with direct control of the security apparatus. His dismissal therefore removes the most obvious uncertainty in Kyrgyz elite politics: whether Tashiev would eventually enter the presidential succession race.

The move suggests a recalibration of internal power balances within Kyrgyzstan's political system. The resignation of the parliamentary

speaker, departures of several members of parliament, and the dismissal of cabinet officials illustrate how the Japarov–Tashiev tandem had generated parallel elite networks within the state apparatus. In the days following the reshuffle, the Constitutional Court confirmed that the next presidential election will take place in early 2027, reinforcing the institutional timetable while removing a potential rival from the political field.

The episode reflects a broader challenge facing presidential systems across Central Asia: managing risks from within ruling elites rather than from organized opposition or societal pressure. Individuals who control security institutions, patronage networks, or regional political bases can evolve into alternative centres of influence inside the state apparatus. Leadership stability therefore depends heavily on maintaining hierarchies within the governing coalition.

The reshuffle also carries a signal for the business community. The Japarov–Tashiev duumvirate created structural ambiguity for actors seeking political support for major investments or commercial decisions. It was often unclear whose approval carried greater weight, or whether securing one endorsement was sufficient without the other.

A consolidated presidency, whatever its other implications, reduces that ambiguity. For investors and companies navigating Kyrgyzstan's political economy, a single authoritative interlocutor is operationally preferable to a dual-headed structure in

which alignment between the two principals could not be assumed.

WHAT TO WATCH

How the presidency redistributes the institutional roles previously concentrated in Tashiev's hands, as well as economic resources and patronage networks associated with him and his allies. Early moves were directed at his influence within the security apparatus. The longer-term question is how President Japarov maintains elite discipline without such a powerful enforcer. The treatment of Tashiev's allies — including potential corruption investigations — will signal how far the system intends to go in reducing his political influence.

The Iran War Exposes Central Asia's Corridor Vulnerability

For the past decade, Central Asian governments have pursued a connectivity strategy built on diversification — reducing dependence on Soviet-era northern routes through Russia by developing alternatives in multiple directions. The southern corridor through Iran was a central element of that strategy. The Kazakhstan–Turkmenistan–Iran railway, completed in 2014, created a direct north-south link to Persian Gulf ports. The Ashgabat Agreement connected Central Asian rail networks to Iranian maritime access. Chabahar was promoted as a gateway to the Indian Ocean bypassing congested Gulf routes. By 2025 these were not aspirational projects — they carried significant freight volumes and anchored real trade relationships.

The US-Israeli strikes on Iran beginning 28 February have disrupted this corridor abruptly and without a clear timeline for

restoration. The exposure varies by country and by the specific nature of their Iranian dependencies. Turkmenistan, which shares a land border with Iran and has no near-term substitute for daily cross-border food and energy flows, is feeling it first. Uzbekistan is redirecting freight that normally transits Iranian ports. Kazakhstan's exposure is more indirect but real: rising oil prices boost stronger export revenues while simultaneously feeding domestic inflation.

The deeper issue is what the disruption reveals about Central Asia's alternatives to Russian transit. The region has invested heavily in two non-Russian corridors: the southern route through Iran and the Middle Corridor through Azerbaijan. Russia's invasion in 2022 made alternative transit a strategic necessity, prompting Central Asian governments to invest in new infrastructure and expand freight volumes along both

routes. Now a second war is testing what that investment actually secured.

The same conflict that has disrupted the southern corridor has already produced a security incident on Azerbaijani territory — a drone strike that Iran officially denied. The episode is a reminder that the Middle Corridor's critical Caspian hub is not insulated from a conflict whose geographic spillover remains unpredictable. Central Asia is discovering that one war revealed the connectivity opportunity; another is revealing the limits.

WHAT TO WATCH

Whether Central Asian governments accelerate investment in true corridor redundancy — expanding Caspian Sea capacity at Aktau and Kuryk, exploring southern overland routes toward Pakistani ports, and advancing the construction of the China–Kyrgyzstan–Uzbekistan railway. Each option reduces dependence on Russian transit in different ways, but none fully substitutes for stable westbound access to global markets. If the conflict extends beyond its initially projected timeline, pressure to secure durable alternatives will intensify. The corridor map Central Asia operates on in 2027 may look materially different from the one it entered 2026 with.

RISK FLAGS

Several emerging pressures could complicate the trajectory outlined above. None represents an immediate crisis, but each has the potential to test the durability of the region's current model of internal consolidation under tightening external conditions.

Russian Pressure on Central Asian Neutrality

Central Asian governments have maintained careful neutrality regarding the Iran war, but Moscow is watching closely. Russia retains multiple levers across the region — remittance flows, language policy, energy pricing, and military basing arrangements — that can be activated if it judges that Central Asian hedging is approaching the limits Moscow accepts. Kazakhstan and Uzbekistan's participation in the recent U.S.-led Board of Peace forum has not gone unnoticed in Moscow.

The risk is not immediate confrontation but gradual pressure: signals that neutrality has limits when Russian strategic interests are directly affected. If the conflict around Iran intensifies or becomes entangled with broader U.S.–Russia tensions, Central Asian governments may find Moscow's expectations of political alignment harder to manage quietly.

The CKU railway as a geopolitical test

The China–Kyrgyzstan–Uzbekistan railway, long delayed, is moving closer to construction. As disruptions to the Iranian corridor highlight the fragility of alternative transit routes, the strategic importance of the project is increasing.

Yet large infrastructure projects in Central Asia rarely advance in a straight line. The CKU railway has faced repeated delays over the past two decades, including periods when geopolitical considerations slowed or stalled progress. Russia’s longstanding discomfort with alternative east–west corridors was widely seen as one factor

limiting momentum before the war in Ukraine reshaped regional transport dynamics.

Even if construction proceeds, the project carries a parallel structural risk. Chinese infrastructure financing expands connectivity but can also deepen long-term economic and political leverage. For Kyrgyzstan in particular, the railway raises a familiar regional dilemma: efforts to reduce dependence on one external power often increase exposure to another. The moment when alternative corridors become most necessary is rarely the moment when the terms of building them can be negotiated from strength.

Tajikistan’s succession opacity

Political stability in Tajikistan remains heavily dependent on a single personalized leadership structure with no clear institutionalized succession mechanism. When political movement eventually occurs — whether through leadership transition or elite repositioning — it is likely to unfold with limited advance warning.

Central Asia’s succession record illustrates the range of possible outcomes. Uzbekistan and Turkmenistan managed leadership transitions smoothly through controlled handoffs within ruling systems. Kazakhstan’s transition began similarly but became a central factor in the violent events of January 2022. Kyrgyzstan has experienced

the region’s most disruptive succession pattern, with repeated episodes of political rupture. Tajikistan’s own foundational experience — the 1992 civil war — remains the region’s starkest reminder of what elite fragmentation under succession pressure can produce.

The risk lies less in immediate instability than in uncertainty about how elite factions would reposition in the absence of clear transition rules. In such environments, early signals typically appear within the security services or presidential administration rather than in formal political institutions. Leadership changes in those structures therefore remain the most reliable indicators of elite realignment.

Inflation and social pressure

Rising global energy and food prices are feeding into Central Asian consumer markets at a moment when several governments have recently expanded implicit social contracts through wage increases, subsidized utilities, and pension adjustments. These measures have helped stabilize political systems but have also increased fiscal exposure to inflation shocks.

The political risk lies in the type of pressure inflation generates. Over the past several years, most Central Asian governments have focused primarily on managing elite consolidation rather than societal contestation. Sustained increases in living costs would shift pressure from intra-elite balancing to public expectations — a dynamic the region’s regimes are institutionally less accustomed to managing.

ANALYTICAL NOTE

Cooperation Without Integration

Much of the commentary on Central Asian regional cooperation frames the current situation as a work in progress — promising momentum that has yet to produce institutional depth. The implicit benchmark is a structured multilateral architecture with binding agreements, permanent secretariats, and enforceable mechanisms. By that standard, Central Asia continues to underdeliver.

But that benchmark reflects observer expectations more than regional realities. Much of the Western policy literature — and many donor-funded assessments — implicitly evaluate Central Asian cooperation against an EU-style template of formalized integration. Applying that framework to a region with different historical trajectories, state capacities, and political incentives produces a misleading analytical picture.

What exists today — regular consultative summits, expanded cross-border mobility, and pragmatic issue-by-issue coordination — is not a stalled transition toward deeper institutional integration. It is, for now, the functional equilibrium: the format regional leaders have chosen to operate within rather than a waypoint toward something more formal. The arrangement addresses practical problems while avoiding binding commitments that could constrain domestic political flexibility. For governments that must balance Russian expectations, Chinese economic penetration, and Western engagement, weak institutionalization is not a weakness of regional diplomacy. It is a structural asset.

Whether this remains the equilibrium is a separate question. Much of the progress achieved since 2016 has been driven by

Uzbekistan's foreign policy reorientation under President Mirziyoyev, which unlocked bilateral and multilateral dynamics that had long been frozen. That progress is real — but it rests on political choices rather than institutional foundations, and political choices are reversible. The consultative format works precisely because it does not overcommit its members. Yet that same quality makes it dependent on the continued will of key leaderships to sustain it.

Institutionalization would not straightforwardly solve this problem. Formal regional architectures are also sustained by political will — they simply make reversal slower and more costly. Whether that friction is an asset depends on what the region is trying to protect, and from what. That question is not yet settled.



Informal meeting of presidents of Kazakhstan, Uzbekistan and Kyrgyzstan during the Consultative Summit of Central Asian Leaders, Cholpon-Ata, Kyrgyz Republic, 2022.

Photo: Press Service of the President of the Kyrgyz Republic

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ABOUT TTM

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