

Central Asian Vantage Point: The Strategic Potential for European Consulting Companies in Central Asia's Information Landscape

1. Central Asia as a strategic information environment

Central Asia has become a more strategically “observable” hinge-zone for Europe because it sits at the interface of two adjacent great-power systems (Russia and China), its economies are being re-wired by sanctions-driven trade re-routing and corridor competition, and the European policy stance has shifted from “transformative enlargement-adjacent” logic to a more pragmatic mix of resilience, connectivity, investment, and standards export. This is reflected in the 2019 EU Central Asia strategy¹, which organizes engagement around resilience, prosperity, and “working better together,” and explicitly frames EU involvement as rules-based connectivity plus deeper institutionalized partnerships (including Enhanced Partnership and Cooperation Agreements).

From the EU’s operational angle, corridor politics matters because *route choice and infrastructure governance* determine not only trade costs but also which actor sets the “rules of the road” (technical standards, customs processes, digital documentation norms, compliance expectations). A core example is the EU-backed effort to accelerate the Trans-Caspian corridor as an alternative Europe–Asia route that does *not* transit Russia; the European Commission explicitly linked the push for alternative routes to the post-2022 strategic environment, and framed corridor development as both economic and geopolitical resilience². At the same time, serious external competition remains. A major policy takeaway from recent security-policy analysis is that Russia and China have managed to cooperate in Central Asia despite points of friction (especially in the economic sphere and around corridor development), and that China’s economic role is already dominant while its security role may expand as Russia’s resources remain tied up in Ukraine³. This means Europe’s leverage is less about “outspending” competitors and more about institutional and informational positioning – i.e., becoming the actor that helps local states and firms meet global-market access requirements (finance, sanctions compliance, customs modernization, auditability, ESG reporting), and in the process becomes a trusted node in how information is produced, structured, and shared.

The central argument of this article is that European consulting companies can increase European influence in Central Asia by embedding European standards, advisory practices, compliance regimes, and market-intelligence capacities into the region's economic and

¹ European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *The EU and Central Asia: New Opportunities for a Stronger Partnership*, Joint Communication, JOIN(2019) 9 final, Brussels, 15 May 2019.

² European Commission, ‘Global Gateway: €10 billion commitment to invest in Trans-Caspian Transport Corridor connecting Europe and Central Asia’, Press Release IP/24/501, 2024.

³ Andrea Kendall-Taylor, Lisa Curtis, Kate Johnston and Nathaniel Schochet, *Russia and China in Central Asia: Cooperate, Compete, or De-conflict?*, Center for a New American Security, November 2024.

administrative systems. Consulting firms should not be understood merely as private service providers selling reports and presentations. They also act as intermediaries of knowledge, standards, managerial techniques, legitimacy, and institutional design. Their reports shape what problems are considered solvable; their benchmarks define what counts as efficiency; and their feasibility studies can decide which infrastructure projects become financially credible.

2. Consulting Companies as Political-Economic Intermediaries

For the purposes of this article, consulting companies should be understood as private professional service firms that provide external expertise to governments, development institutions, state-owned and local businesses. Their activity may include strategy advisory, regulatory advisory, infrastructure planning, digital transformation, market-entry support, energy advisory, ESG assessment, and market intelligence. In politically sensitive regions such as Central Asia, their most important role is often intermediary rather than merely advisory: they translate political uncertainty into risk matrices, feasibility studies, compliance procedures, procurement rules, investment roadmaps, regulatory benchmarks, and market-entry strategies.

Consulting companies influence decision-making not primarily by formal authority, but by organising the categories, indicators, and risk models through which actors understand their own constraints and opportunities. When a ministry, bank, logistics company, or state-owned enterprise faces a problem involving sanctions exposure, trade rerouting, public procurement, customs digitalisation, investor confidence, or infrastructure bottlenecks, consultants offer models through which the problem becomes legible. This is already a form of influence: the actor who defines the problem strongly affects the range of available solutions. A customs problem may be reframed as a digitalisation problem; a financing problem may be reframed as a transparency problem. Each diagnosis opens one path of reform and closes others.

3. Why consulting sector is a plausible “vector” in practice

Several large professional services networks already operate in parts of the region and openly emphasize advisory and regulatory expertise there—meaning feasibility is established, and Europe can build on existing professional ecosystems rather than starting from zero. For example, Deloitte’s regional site states it has multiple offices in Kazakhstan and a presence in Uzbekistan, employing “nearly 700 professionals” across the region⁴. KPMG’s Uzbekistan site describes a “Caucasus and Central Asia” cluster with offices including Kazakhstan, Uzbekistan, and Kyrgyzstan, and emphasizes audit/tax/legal/advisory plus risk management and performance improvement⁵.

This is where consulting becomes strategically relevant for European influence. The diffusion of European standards does not require overt political alignment. A Central Asian government does not need to declare itself anti-Russian or anti-Chinese in order to adopt European-style compliance procedures, beneficial ownership rules, ESG reporting, customs transparency systems, or procurement standards. Influence is exercised through procedures, documentation, audits, benchmarks, databases, and risk categories. Once such systems are adopted, local

⁴ Deloitte DKU, ‘Our offices’, Deloitte, accessed 24 May 2026.

⁵ KPMG Uzbekistan, ‘About KPMG’, accessed 24 May 2026.

institutions become more interoperable with European markets, European banks, European development institutions, and European investors.

4. Country-by-country consulting logic

The governments of Kazakhstan, Uzbekistan, Kyrgyzstan, and Turkmenistan pursue their own strategies, often described as multi-vector, pragmatic, or sovereignty-preserving. They are not merely pawns in a great-power game; they use external competition to consolidate autonomy and bargaining power. This creates an opening for European actors, but only if the offer is precise. Europe cannot simply present itself as another geopolitical patron. It must offer usable institutional capacity: safer market access, credible standards, transparent financing, and administrative tools that reduce dependence on any single external power.

Kazakhstan is the most plausible regional hub for European consultancies because it combines relatively high digital government capacity (EGDI rank 24), high corridor relevance, and a large enough market to sustain specialized practices (trade facilitation, energy/transition advisory, compliance)⁶. The ADB analysis also underscores the significance of Russia-linked energy export routes (CPC to Novorossiysk), which can be reframed as both a dependency risk and an information opportunity (monitorable chokepoints, rerouting incentives)⁷. A key “influence-through-consulting” angle here is helping public agencies and quasi-state firms improve transparency, procurement integrity, and cross-border digital workflows—areas where EU/IFI standards are strong and often demanded by international financing⁸.

Uzbekistan is well-suited for an institution-building and reform-advisory model. The EBRD’s Uzbekistan country strategy explicitly emphasizes wide-ranging policy advice to support government reforms and business advice to SMEs, and links constraints to governance capacity, SOE reform, and sustainable infrastructure⁹. An EBRD project example shows direct involvement in SOE governance reform: developing roadmaps, drafting laws, and strengthening monitoring/disclosure in state-owned enterprises.¹⁰

Kyrgyzstan is the clearest case for an “economic signal extraction” model—because of re-export dynamics, remittance dependence, and exposure to sanctions spillovers. The IMF’s 2025 Article IV concluding statement attributes a very large share of the 2024 current account deficit to “unrecorded re-exports” into the Eurasian Economic Union, explicitly noting that intra-union trade is not subject to customs declarations¹¹. The IMF also links possible escalation of Western sanctions on Russia to risks of reduced remittances and higher poverty—thereby positioning Kyrgyz macro indicators as indirect signals of Russian economic conditions¹². Separately, the

⁶ UN DESA, *E-Government Survey 2024*, 2024.

⁷ Asian Development Bank, *Middle Corridor Paper: Trade Flows and Transport Routes in the CAREC Region*, CAREC Senior Officials’ Meeting paper, 2024.

⁸ World Bank, *Middle Trade and Transport Corridor*, 2023.

⁹ European Bank for Reconstruction and Development, *Uzbekistan Country Strategy 2024–2029*, 2024.

¹⁰ European Bank for Reconstruction and Development, ‘Support in the Implementation of the Strategy for Management and Reform of State-Owned Enterprises in the Republic of Uzbekistan’, 2021.

¹¹ International Monetary Fund (IMF), ‘Kyrgyz Republic: Concluding Statement of the 2025 Article IV Consultation Mission’, 2025.

¹² *Ibidem*.

World Bank country data page reports personal remittances received at 17.7% of GDP (2024)¹³. This combination supports a consulting strategy centered on: sanctions compliance, customs modernization, AML/CFT strengthening, and financial-sector risk management—services that improve governance while also producing legitimate, decision-useful aggregated insights about regional trade and labor flows¹⁴.

Turkmenistan should be treated as a restricted-access environment. Its EGDI position is substantially lower (rank 145), and Freedom House documents extremely low freedom conditions¹⁵. The ADB paper notes that Turkmenistan participates in trans-Caspian shipping dynamics via Turkmenbashi, including oil product exports and port throughput figures, but even that discussion signals that reliable, granular public data may be limited and often filtered through official channels¹⁶. For European consulting firms, the plausible posture is narrower and more conservative: compliance-heavy engagement, like carefully scoped technical projects (e.g., trade facilitation components tied to IFI programs)¹⁷.

These differences point toward a differentiated operating model. Kazakhstan should be treated as the logistics, energy, sanctions, and Middle Corridor hub. Uzbekistan should be treated as the demographic, reform, industrial, and public-sector modernisation hub. Kyrgyzstan should be approached primarily through compliance, customs, banking, and logistics transparency, because its value lies in making Eurasian trade flows more transparent rather than in being treated merely as a growth market. Turkmenistan should be approached through narrow technical sectors: gas, methane reduction, energy efficiency, environmental monitoring, and limited infrastructure advisory.

European consulting companies can serve three strategic functions in this setting. The first is diversification support: they offer Central Asian states a third institutional language, distinct from Russian familiarity and Chinese infrastructure-financing models that may generate dependency risks.. The second is information advantage: work in logistics, banking, customs, energy, procurement, and market research can help European actors understand sanctions adaptation, Chinese commercial behaviour, corridor shifts, and local receptivity to European alternatives. The third is institutional embedding: if European standards become part of customs procedures, compliance platforms, procurement rules, ESG certification, critical minerals documentation, and investment due diligence, European influence becomes routine rather than merely symbolic.

5. Central Asia as a vantage point on Russia and China

Central Asia can provide lawful strategic insight into Russia in at least five areas: trade diversion and sanctions adaptation, Russian corporate relocation, labour migration and remittances, financial intermediation, and elite hedging. Re-export patterns through Kazakhstan and Kyrgyzstan can reveal which goods Russia struggles to obtain directly. Russian firms

¹³ World Bank, “Personal remittances, received (% of GDP) — Kyrgyz Republic,” World Development Indicators, 2024.

¹⁴ FATF/EAG, *Kyrgyz Republic Follow Up Report — 2024*, 2024.

¹⁵ Freedom House, *Turkmenistan: Country Profile*, Freedom in the World 2026.

¹⁶ Asian Development Bank, *Middle Corridor Paper*, CAREC, 2024

¹⁷ European Bank for Reconstruction and Development, *The EBRD in Turkmenistan*, 2026; World Bank Group, *Turkmenistan Country Engagement Note for FY2026–FY2027*, 2025/2026.

opening subsidiaries or seeking local banking channels can indicate pressure inside the Russian economy. Fluctuations in migration and remittances can reveal labour-market conditions, mobilisation fears, and Russian demand for low-cost labour. Banking and payments consulting can show how Russian actors adapt to exclusion from Western financial systems.

Central Asia can also provide insight into China. Feasibility studies, logistics audits, procurement data, project-finance terms, subcontracting patterns, and labour practices can reveal whether Chinese-backed projects are commercially viable or politically driven. Because Central Asia borders Xinjiang and is central to China's westward strategy, trade and infrastructure patterns can also reveal how Beijing seeks to stabilise and economically integrate its western frontier. The key point is that Central Asia makes Russia and China observable through their external behaviour. It is therefore a strategic periphery where Russian weakness, Chinese ambition, and European opportunity intersect.

6. Praxeological Model

The practical part of the strategy should follow a sequence: enter, legitimise, embed, observe, transfer capacity, and scale. First, European consulting companies should consider creating regional compliance platforms in Kazakhstan and Uzbekistan, with satellite operations in Kyrgyzstan and carefully limited sectoral engagement in Turkmenistan. These platforms should help banks, logistics companies, customs agencies, importers, exporters, and industrial firms comply with EU sanctions, export controls, anti-money laundering standards, and beneficial ownership requirements. This would serve both local and European interests: Central Asian firms would gain access to safer international finance, while European institutions would gain better visibility into suspicious trade flows.

Second, European firms should support independent or semi-independent trade corridor observatories. These could monitor shipment times, customs delays, freight prices, bottlenecks, port capacity, insurance costs, rail gauge changes, documentation failures, and suspicious commodity flows. The Middle Corridor is the obvious initial focus. Corridor observatories would not only improve logistics efficiency; they would also generate high-value market intelligence about China-Europe trade flows, Russian route substitution, Caspian logistics, and regional infrastructure capacity.

Third, European consultancies should offer procurement transparency tools, tender design, project evaluation, anti-corruption systems, and contract-management support. Procurement rules become geopolitical instruments when Chinese financing, Russian political pressure, Turkish construction firms, Gulf capital, European Global Gateway projects, and development-bank funding compete in the same space. The strategic role of European firms is not simply to help European companies win contracts, but to make procurement environments more transparent, bankable, and compatible with European financing.

Fourth, consulting firms should create due diligence systems for critical minerals, energy, environmental impact, labour standards, ownership transparency, and export certification.

Kazakhstan and Uzbekistan are especially relevant in critical minerals, while Turkmenistan remains significant in gas¹⁸.

Fifth, European consulting companies should invest in social research and digital governance advisory: polling, focus groups, media analysis, elite interviews, data protection frameworks, digital identity systems, cybersecurity standards, e-customs, e-procurement, and digital public services.

Finally, every project should include capacity transfer: training civil servants, creating local analytical units, partnering with universities, publishing non-sensitive methodologies, and leaving behind operational tools rather than only strategic presentations.

7. Risk

Sanctions and anti-circumvention pressure is structurally increasing. The EU's 11th sanctions package explicitly aimed to crack down on circumvention and introduced tools to restrict flows where third-country jurisdictions are considered high-risk for circumvention¹⁹. OECD analysis likewise highlights that intermediary trade in dual-use goods risks secondary sanctions²⁰. This implies that a European consulting presence that touches customs, logistics, finance, or export documentation must be built on strict compliance architecture—or it becomes an exposure, not an advantage. AML/CFT regimes are central to both risk management and reputational viability. FATF materials show ongoing monitoring and follow-up reporting for Kyrgyzstan (including references to progress addressing technical compliance deficiencies), and confirm that several countries in the region are assessed under the Eurasian Group (EAG) framework^{21, 22}. This supports a concrete recommendation: European consultancies should treat AML/CFT maturity not as background context but as a core product line and a core due diligence filter for client acceptance. Governance and corruption risk is non-trivial and measurable. CPI scores for the four countries are low-to-mid (Kazakhstan 38; Uzbekistan 31; Kyrgyzstan 26; Turkmenistan 17)²³. Freedom House rates the political environment as “Not Free”²⁴ across the set, with especially acute constraints in Turkmenistan. The implication is that “influence through consulting” can degrade into “capture through consulting” unless firms implement strong safeguards. Data quality and state statistics can be strategically distorted. The IMF's discussion of unrecorded re-export flows (and the associated measurement distortions) is a reminder that even macroeconomic data may embed large uncertainties when trade flows move into less-transparent channels. That creates demand for better measurement—but also warns against overconfidence in dashboards that treat official data as complete.

18 European Commission, “Strategic partnership with Kazakhstan on raw materials, batteries and renewable hydrogen”; European Commission, “EU–Uzbekistan partnership on critical raw materials,” 4 April 2024; U.S. Energy Information Administration, “Turkmenistan: Country Analysis Brief.”

19 European Commission, “EU adopts 11th package of sanctions against Russia for its continued illegal war against Ukraine,” Press Release IP/23/3429, 23 June 2023.

20 OECD, *Trade Facilitation in Central Asia*, OECD Publishing, 2023.

21 FATF/EAG, “Kyrgyz Republic's progress in strengthening measures to tackle money laundering and terrorist financing,” 2024.

22 FATF, “Eurasian Group (EAG),” FATF global network page.

23 Transparency International, *Corruption Perceptions Index 2025*

24 Freedom House, *Freedom in the World 2026*

Several additional risks should be kept conceptually separate. Russia and China may interpret European consulting expansion as geopolitical encroachment; this can be reduced by framing projects in terms of compliance, transparency, trade facilitation, investment quality, and local capacity-building. Elite capture is another danger, because concentrated power and patronage can turn consulting into a mechanism of elite legitimation. Authoritarian co-optation is equally serious: digital government, social research, and data analytics must not strengthen coercive monitoring, political profiling, or repression of civil society.

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because the EIA result I found directly discusses Turkmenistan's gas-production significance in the Caspian region.

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