BRITISH CHAMBER OF COMMERCE IN KAZAKHSTAN

NARXOZ UNIVERSITY

KBTU KAZAKH-BRITISH TECHNICAL UNIVERSITY

INDUSTRY BENCHMARK REPORT

AI Adoption and Technology Sourcing in Kazakhstan's Industrial Companies

An empirical assessment of artificial intelligence adoption practices among seventeen industrial enterprises in Kazakhstan, with strategic implications for organizational decision-making

IN PARTNERSHIP WITH

British Chamber of Commerce in Kazakhstan · Narxoz University · KBTU

Prepared by a cross-functional AI & Industrial Technology Advisory team • August 2026

INTRODUCTION

AI Adoption and Technology Sourcing in Kazakhstan's Industrial Companies

Purpose of This Report

This report presents the findings of a survey-based assessment of artificial intelligence (AI) adoption and technology-sourcing practices among industrial companies operating in Kazakhstan, conducted in June 2026. It has been prepared to provide industrial-sector leadership — corporate executives, technology and innovation officers, and functional decision-makers — with an evidence-based reference point for evaluating their own organization's AI adoption trajectory relative to a defined peer set, and for informing internal decisions regarding talent investment, vendor selection, budget governance, and performance measurement.

Background and Context

Interest in artificial intelligence among industrial organizations in Kazakhstan, as elsewhere, has expanded rapidly over the past several years, driven by advances in generative and analytical AI capabilities and by heightened competitive pressure to digitize core operations. However, publicly available, empirically grounded information on the actual state of AI adoption within Kazakhstan's industrial sector — as distinct from stated intent or vendor-reported activity — has remained limited. This report was developed to address that gap, drawing on primary survey data collected directly from industrial-sector respondents rather than on secondary or anecdotal sources.

Scope and Methodology

The findings presented in this report are derived from a structured online survey completed by seventeen (17) senior representatives of industrial companies operating in Kazakhstan, spanning the energy, mining, manufacturing, chemical, logistics, and adjacent sectors, together with a smaller number of technology and professional-services respondents. The survey instrument covered nine principal areas: respondent and organizational profile; technology priorities; current AI adoption levels; organizational readiness; barriers to adoption; vendor sourcing and evaluation practices; recent implementation experience; forward-looking plans; and open-ended qualitative commentary.

How This Report Is Organized

Following this introduction, the report proceeds as follows: an executive summary of the principal findings; a detailed presentation of survey results organized by thematic area and supported by quantitative exhibits; a set of prioritized, evidence-based recommendations structured according to a finding–recommendation–expected impact framework; an independent expert perspective contextualizing the Kazakhstan findings against international benchmarks; and a statement of the study's limitations and appropriate use.

ACKNOWLEDGMENTS

Prepared with contributions from a cross-institutional working group

This report was prepared by the **AI in Business Working Group of the British Chamber of Commerce in Kazakhstan**, bringing together representatives from academia, professional services, and the international business community in Kazakhstan.

AI in Business Working Group Leader and Survey Coordinator: Dana Isabaeva

British Chamber of Commerce in Kazakhstan

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EXECUTIVE SUMMARY

Interest in artificial intelligence is nearly universal; operational maturity remains substantially limited.

All seventeen industrial companies surveyed in Kazakhstan identified artificial intelligence as a leading technology priority; however, a substantial and measurable gap persists between this expressed interest and demonstrated production outcomes. This report characterizes the nature of that gap and identifies the organizational practices that distinguish companies capable of converting early interest into sustained operational advantage.

100%

of companies name AI/ML as their top-interest technology (Q5)

58.8%

of initiatives are still at the pilot stage; none have reached full-scale deployment (Q6)

3.71/5

talent and expertise gap is barrier #1 — ahead of cost (Q9)

70.6%

of completed AI pilots cost under $50K (Q16B)

Strategic implication:

The barriers to adoption identified in this survey are predominantly organizational rather than technological in character. Organizations that achieve superior outcomes do not defer investment pending conclusive evidence of return on investment; rather, they invest systematically in talent development, establish rigorous and documented vendor-evaluation processes, and design the transition from pilot to full-scale deployment in advance of operational necessity.

KEY FINDINGS

Five principal findings and their organizational implications

1 Adoption Delay Is a Sector-Wide Pattern, Not an Isolated Shortfall

58.8 percent of artificial intelligence initiatives remain at the pilot stage across the sample, and no surveyed organization has achieved full-scale production deployment, indicating an industry-wide structural pattern.

2 Human Capital Constitutes the Principal Constraint on Adoption

Deficits in talent and internal expertise represent the foremost barrier to adoption, receiving a mean severity rating of 3.71 out of 5.00, which exceeds even the rating attributed to implementation cost (3.53).

3 Vendor Evaluation Practices Remain Structurally Underdeveloped

88 percent of respondents report difficulty assessing vendor quality and reference case studies, and an equivalent proportion rely primarily on informal networks rather than structured evaluation platforms.

4 Low-Cost Piloting Has Not Translated Into a Defined Scale-Up Pathway

70.6 percent of completed pilot projects were delivered for under $50,000; however, no organization has established a documented pathway to full-scale deployment, representing a material opportunity for early movers.

5 Mid-Size Enterprises Constitute the Majority of the Respondent Base

52.9 percent of respondent organizations employ fewer than 500 staff, confirming that resource-constrained mid-size enterprises represent the predominant segment of this market rather than a peripheral one.

METHODOLOGY

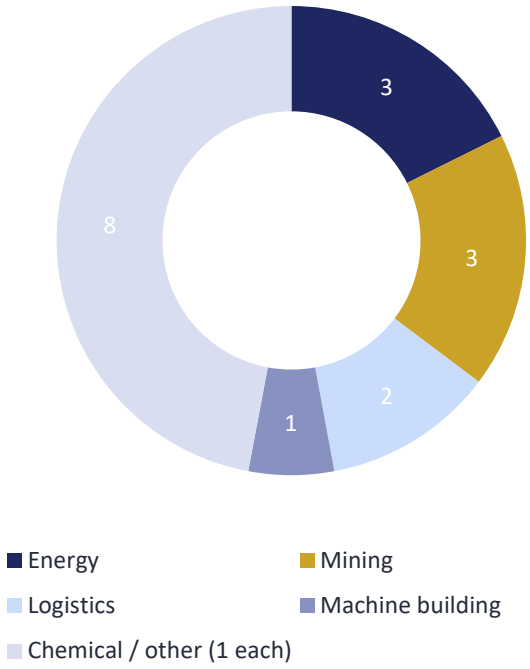
Who we surveyed

An online survey (Google Forms) reached 17 senior leaders at industrial companies in Kazakhstan — from large national and international enterprises to small and mid-size technology-forward businesses.

A note on the sample

17 companies is a qualitative pulse-check, not a statistically representative sample — treat these results as a reliable read on decision-makers' sentiment, not a precise market-wide estimate.

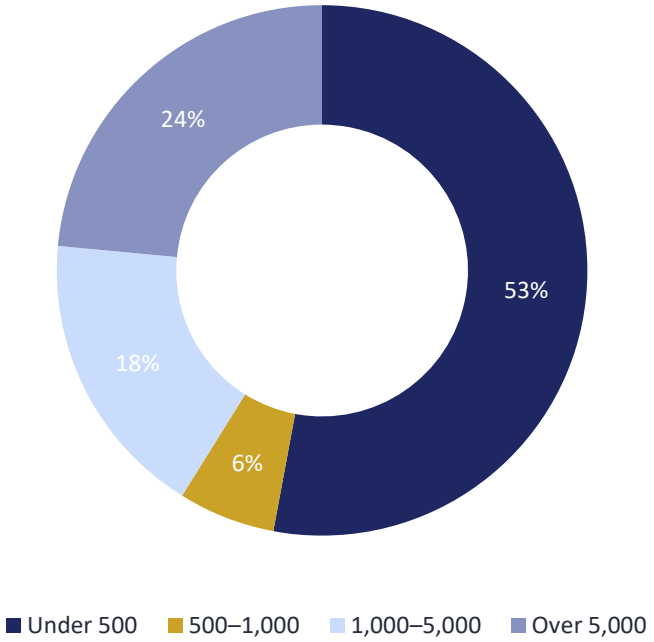
Sample by industry (Q1)



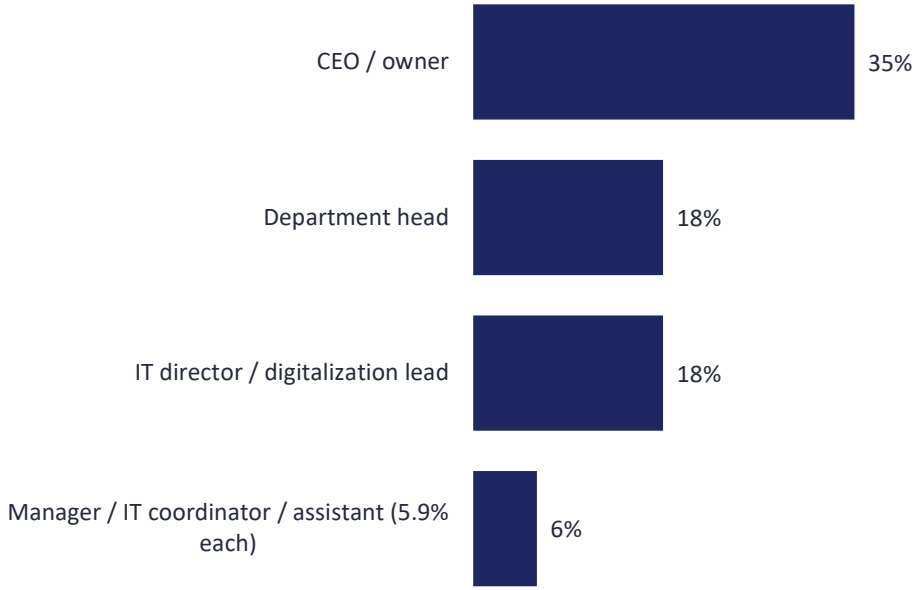
RESPONDENT PROFILE

Who answered: company size and role

Company size, number of employees (Q2)



Respondent's role (Q3)

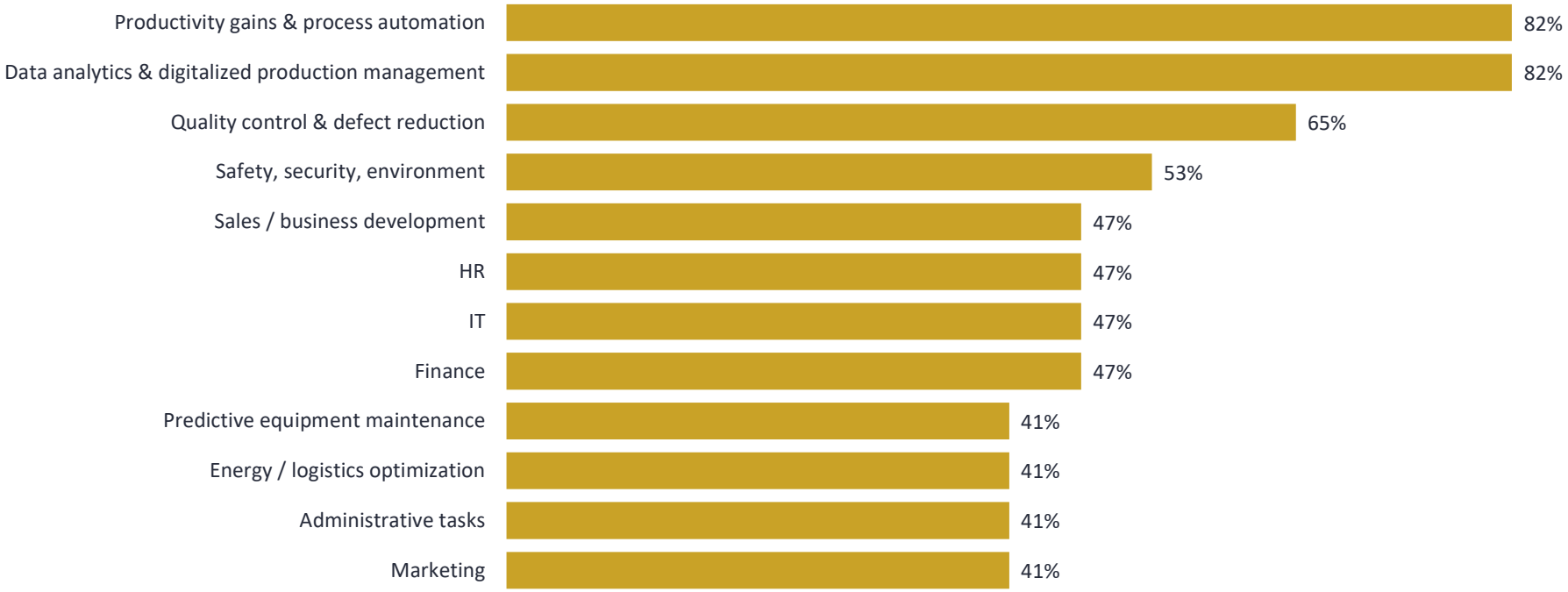


Over 70% of responses come from the top decision-maker or the head of technology — the people who directly control AI investment decisions at their companies.

TECHNOLOGY PRIORITIES

Anticipated technology priorities over the subsequent two-to-three-year horizon

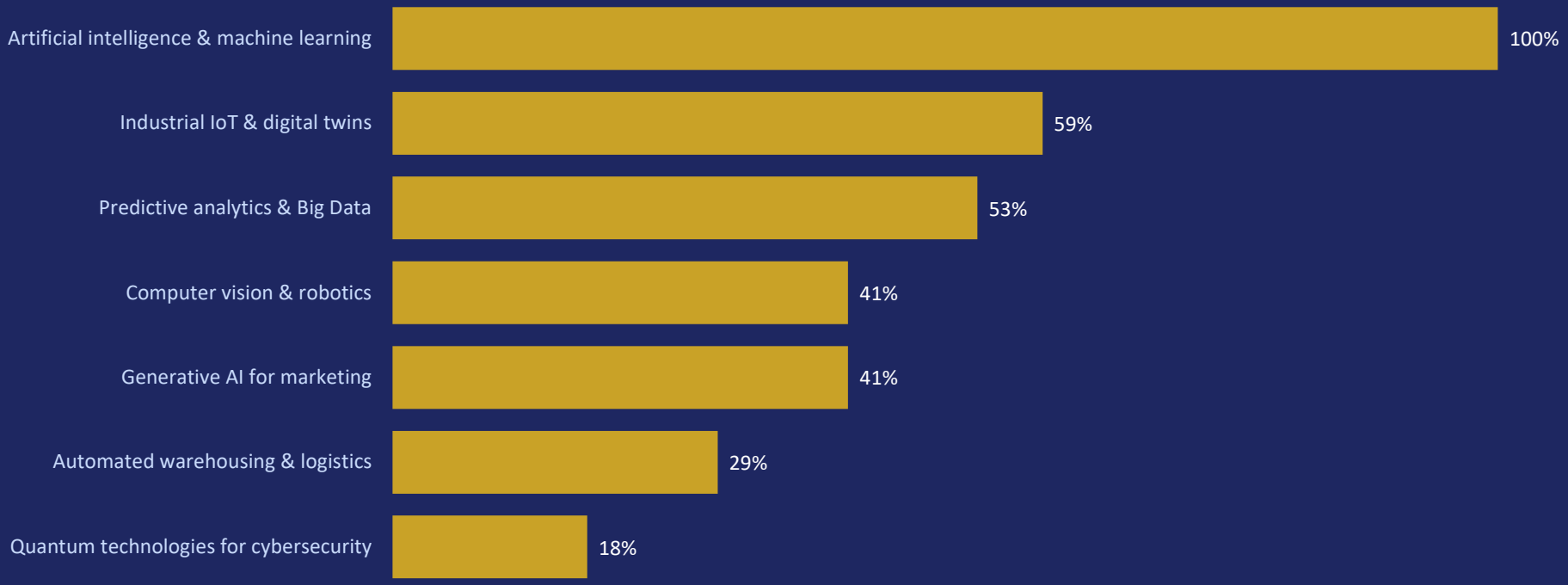
Share of companies flagging the task (Q4 , multiple choice)



TECHNOLOGY PRIORITIES

Artificial Intelligence Commands Unanimous Strategic Priority

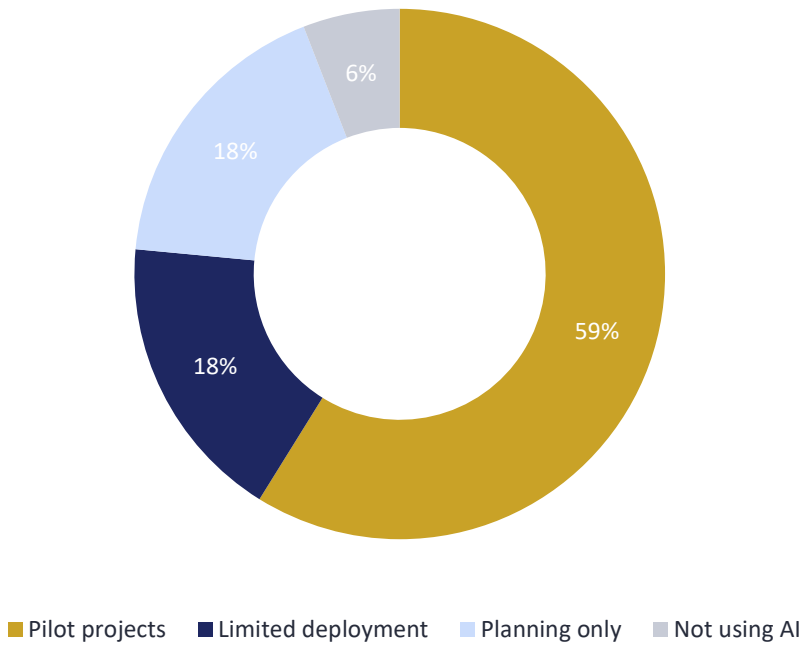
All respondents (100 percent) identified artificial intelligence and machine learning as the technology of greatest interest for future adoption (Q5)



ADOPTION MATURITY

Current stage of artificial intelligence initiatives across the sample

Stage of AI / digital initiatives (Q6)



58.8% of companies are stuck at the pilot-project stage

0% of companies have reached full-scale industrial deployment

5.9% aren't using AI at all — interest is nearly universal

The transition from pilot to full-scale deployment remains unresolved across the industry: while interest and pilot activity are pervasive, no organization within the sample has achieved full-scale production deployment. The organization that first establishes a replicable pathway through this transition is positioned to secure a durable competitive advantage.

CURRENT IMPACT ON THE BUSINESS

Perceived benefit precedes documented financial impact

Average agreement with statements about AI's role, scale 1–5 (Q7)

0.83

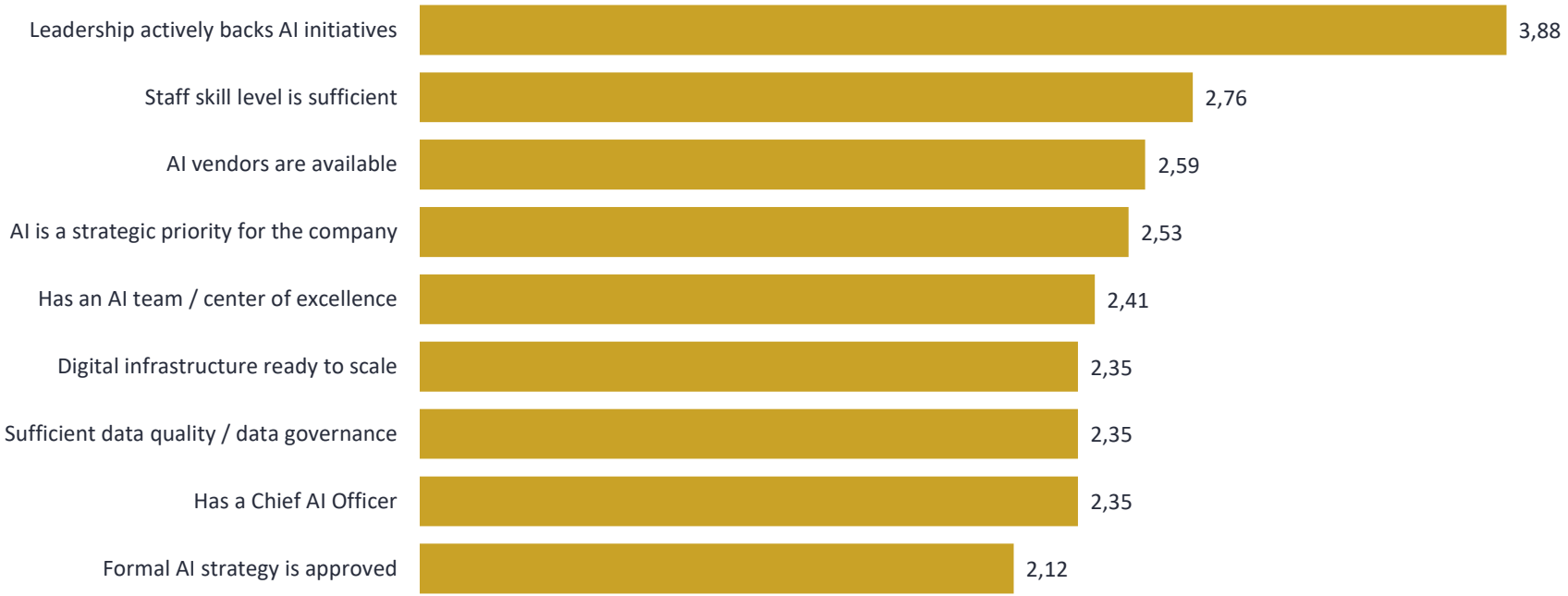
points separate the mean rating for “improved process efficiency” (3.24) from the mean rating for “measurable financial result” (2.41)

This divergence indicates that organizations perceive qualitative operational benefits from artificial intelligence but generally lack the analytical tools and standardized metrics required to quantify these benefits with precision — a pattern consistent with the absence of an established methodology for evaluating return on investment.

STRATEGIC READINESS

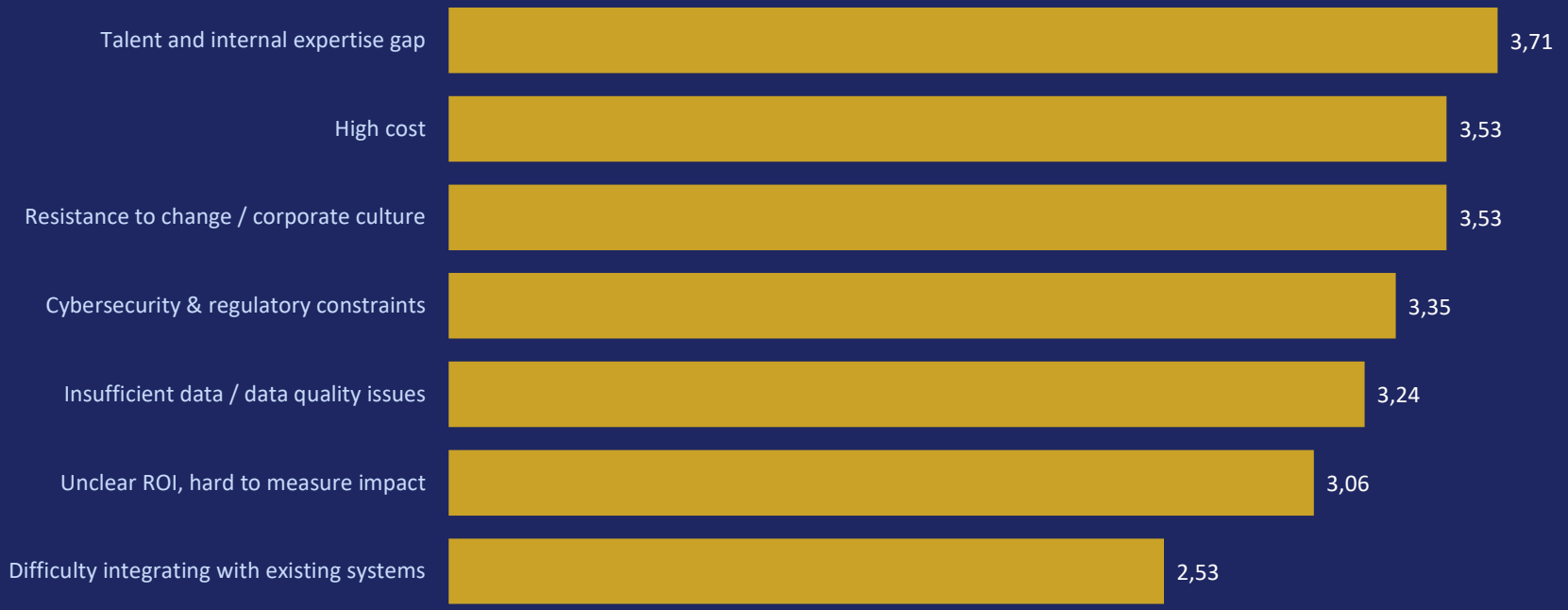
Executive sponsorship precedes institutional readiness

Readiness for AI adoption, average score 1–5 (Q8)



ADOPTION BARRIERS

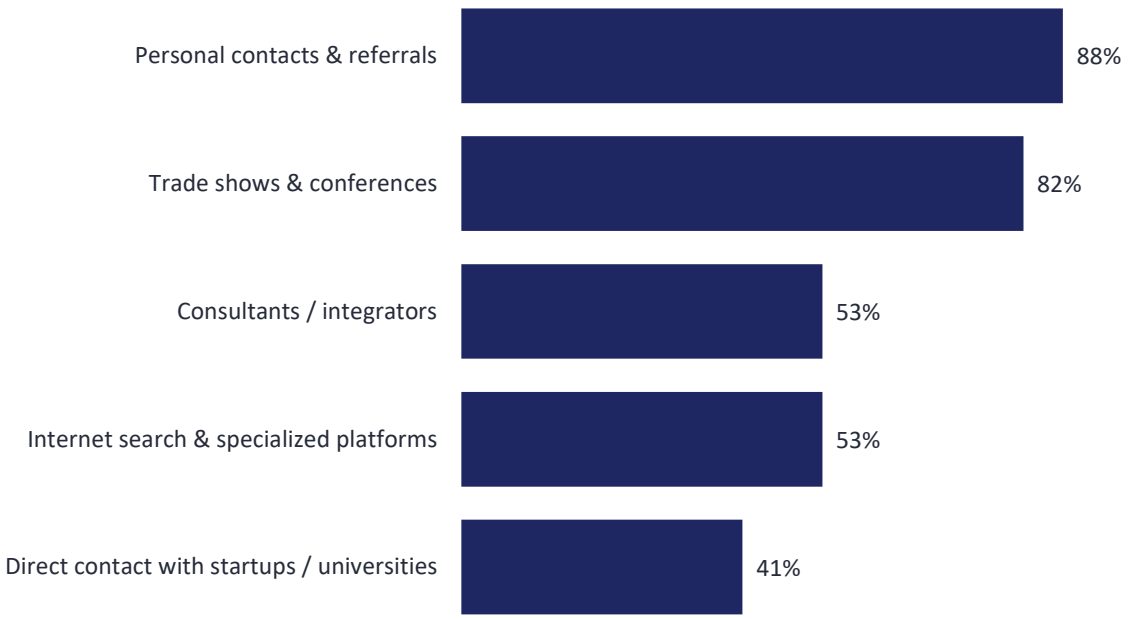
Organizational Capacity, Not Technology, Represents the Principal Barrier



SOURCING SOLUTIONS

Technology sourcing remains dependent on informal professional networks

Channels used to find technology vendors (Q10)



88%

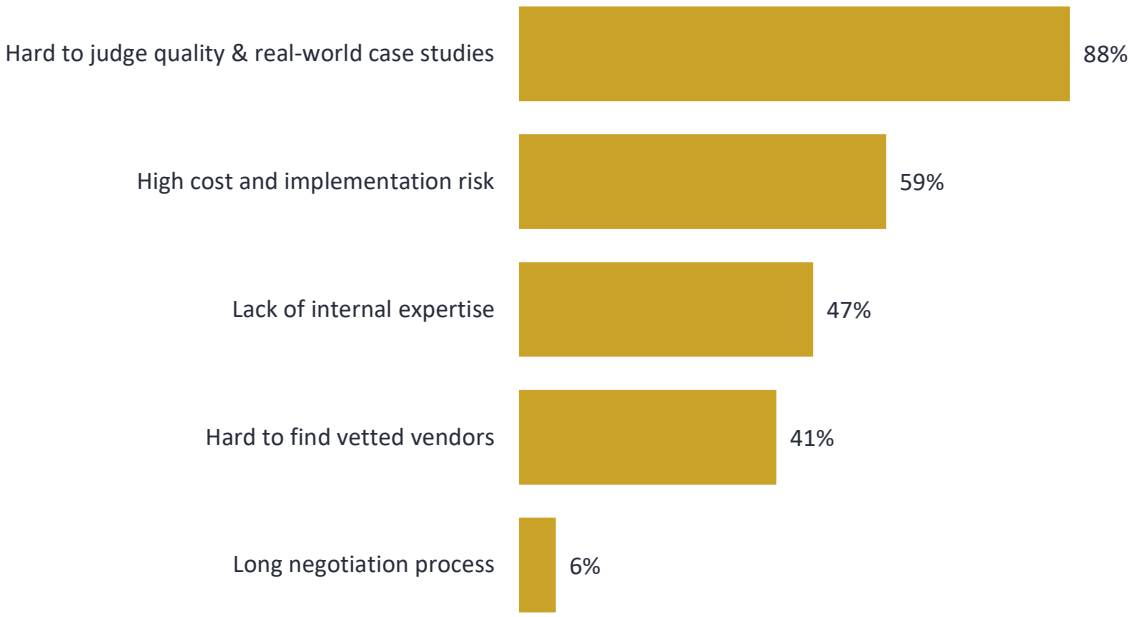
of respondents rely primarily on personal contacts rather than structured, independently verifiable sources of vendor information

The platforms explicitly named by respondents are general-purpose rather than specialized — including Google, YouTube, Instagram, LinkedIn, and Meta, alongside generative AI tools such as ChatGPT, Gemini, and Claude.ai — indicating the absence of dedicated, industry-specific solution catalogs within the current market.

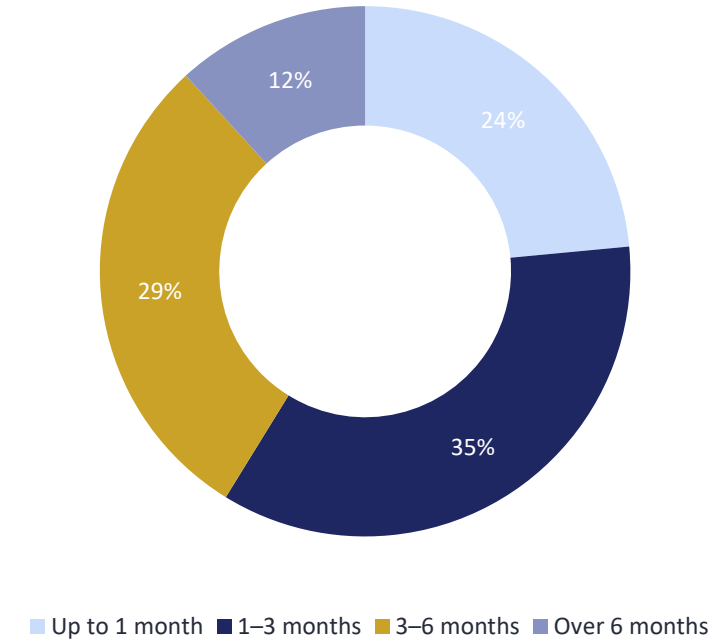
SOURCING SOLUTIONS

Assessment of vendor quality represents the foremost sourcing challenge

Difficulties in finding technology solutions (Q11)



Time to find & choose a solution (Q12)

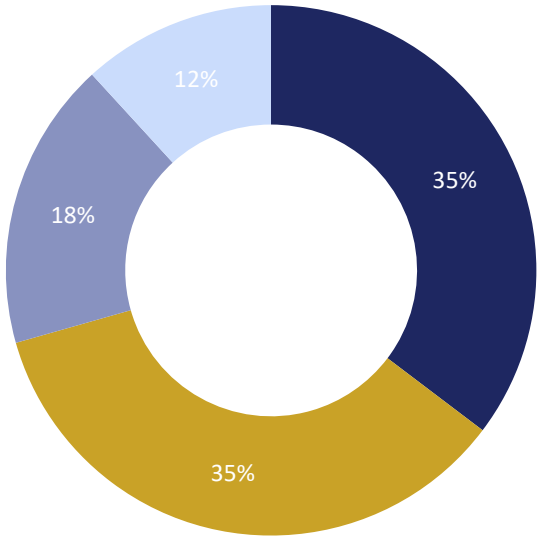


A majority of surveyed organizations (76.5 percent) require more than one month to reach a technology-sourcing decision, a duration that represents a meaningful competitive exposure within a rapidly evolving technology market.

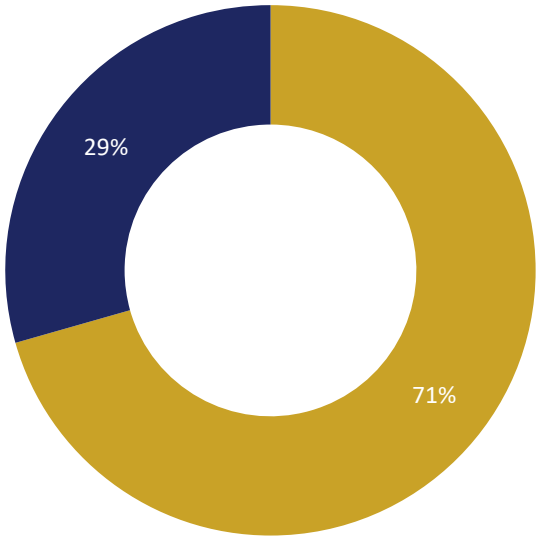
HANDS-ON IMPLEMENTATION EXPERIENCE

A majority of organizations actively sourced AI solutions within the preceding six months

How the project ended (Q15B)



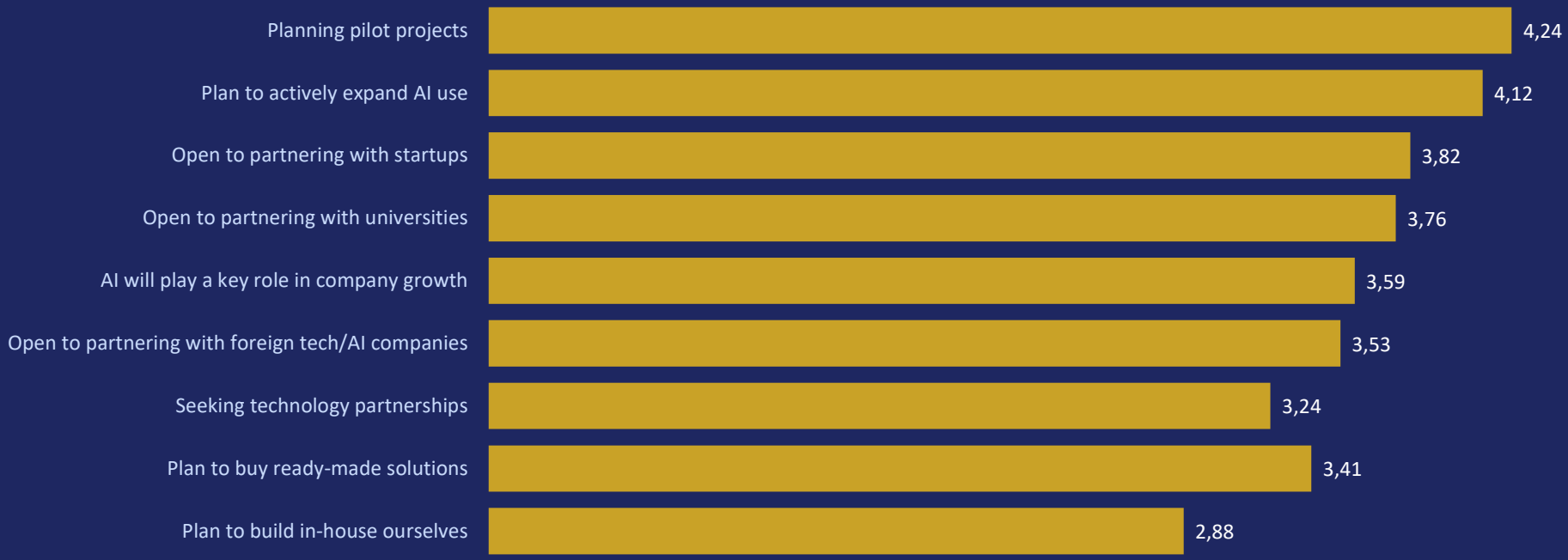
Project budget (Q16B)



Only 11.8 percent of documented projects reached full deployment, and no project within the sample exceeded a budget of $200,000. While the financial barrier to entry is comparatively modest, no organization has institutionalized a defined pathway from pilot to production scale.

LOOKING AHEAD

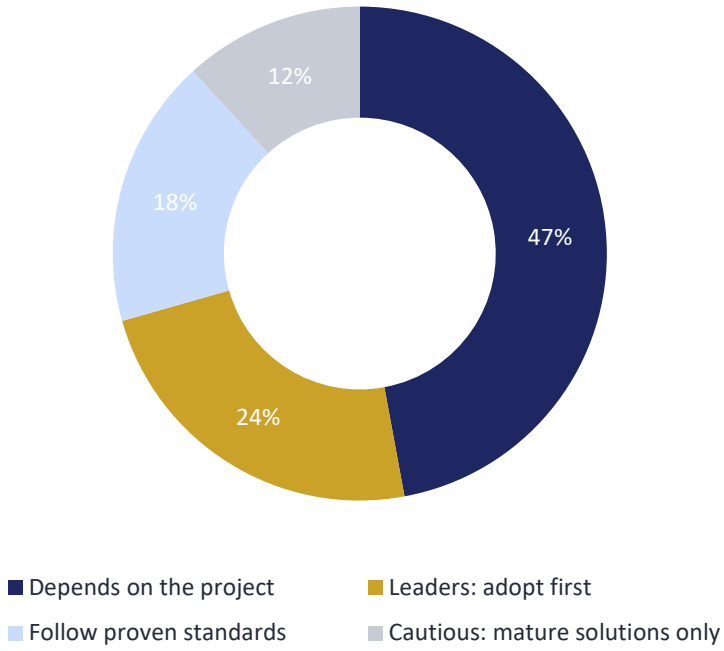
Organizations Express Strong Intent to Expand Adoption, Contingent on Adequate Support



APPROACH TO INNOVATION

A pragmatic, context-dependent posture toward technology adoption

Company's approach to new technology (Q18)



> *Those who succeed won't be specialists anymore — they'll be the people who use AI*

> *There are no mature solutions. No successful case studies, no metrics for comparison and evaluation. Costs are high because of cybersecurity requirements*

Six priority actions, ranked by evidentiary urgency

01

Build Internal Talent

CRITICAL

02

Fix Vendor Due Diligence

HIGH

03

Budget & Pilot Governance

HIGH

04

Get Your Data Ready

HIGH

05

Right-Size for Mid-Size

MEDIUM

06

Define Success Metrics

CRITICAL

RECOMMENDATION 1 OF 6 — AI & INDUSTRIAL TECHNOLOGY ADVISORY

Talent and Organizational Capability

CRITICAL

01

FINDING

Across the surveyed population, the deficit of specialized talent and internal artificial-intelligence expertise emerges as the most frequently cited constraint on adoption, receiving a mean severity rating of 3.71 on a five-point scale — a rating that exceeds even the perceived burden of implementation cost (3.53). This finding is corroborated by structural indicators: fewer than half of the organizations surveyed report the existence of a dedicated artificial-intelligence owner, a Chief AI Officer, or an internal center of excellence responsible for coordinating adoption efforts. In the absence of such governance structures, artificial-intelligence initiatives tend to depend on the initiative of individual technically proficient employees, a pattern that introduces considerable organizational risk in the event of staff turnover and that constrains the scalability of early successes.

RECOMMENDATION

Organizations should formally designate executive-level ownership of artificial-intelligence strategy, even where this responsibility is assigned on a part-time or dual-role basis, and should commit financial and administrative resources to structured upskilling programs for technical and managerial leadership in advance of, rather than in response to, the initiation of new pilot projects. Where internal capacity is insufficient, engagement with external training providers, academic institutions, or industry consortia should be considered as a supplementary measure to accelerate capability development.

EXPECTED IMPACT

This measure is expected to reduce organizational dependence on ad hoc or individually held expertise, to improve the consistency and success rate of pilot initiatives, and to establish institutional continuity that persists independently of any single employee's tenure.

RECOMMENDATION 2 OF 6 — AI & INDUSTRIAL TECHNOLOGY ADVISORY

Vendor Due Diligence and Technology Sourcing

HIGH

02

FINDING

A substantial majority of respondents — 88 percent — report difficulty in evaluating the quality of prospective technology vendors and in obtaining credible reference cases or documented evidence of prior implementation success. The same proportion of respondents indicate that they rely predominantly on personal professional networks, rather than structured or independently verifiable sources of information, when identifying and selecting technology partners. This pattern suggests that the market for artificial-intelligence solutions within Kazakhstan's industrial sector remains informationally opaque, imposing a disproportionate burden on organizations that lack extensive personal networks within the technology sector and materially extending the duration of the sourcing cycle.

RECOMMENDATION

Organizations should establish a formal, documented framework for vendor evaluation that incorporates verifiable reference checks, independent security and data-governance review, and a transparent assessment of total integration cost. Prior to contract execution, organizations should require prospective vendors to demonstrate a working proof-of-concept using the organization's own operational data, rather than relying on vendor-provided demonstrations conducted on synthetic or unrepresentative datasets.

EXPECTED IMPACT

Adoption of a structured evaluation framework is expected to reduce the risk of vendor selection error, to improve the comparability of competing proposals, and to shorten the technology-sourcing decision cycle, which currently exceeds one month for 76.5 percent of surveyed organizations.

RECOMMENDATION 3 OF 6 — AI & INDUSTRIAL TECHNOLOGY ADVISORY

Budget Allocation and Pilot Governance

HIGH

03

FINDING

The financial data collected in this survey indicate that 70.6 percent of completed artificial-intelligence pilot projects were delivered within a budget of under fifty thousand United States dollars, demonstrating that the financial barrier to initiating experimentation is comparatively modest. Notwithstanding this observation, no organization within the surveyed sample reported having achieved full-scale, enterprise-wide deployment of any artificial-intelligence initiative, indicating that the pathway from a successful pilot to production-scale implementation remains undefined across the industry. Consistent with this pattern, 17.6 percent of documented project outcomes resulted in outright discontinuation.

RECOMMENDATION

Prior to the initiation of any pilot project, organizations should formally define quantifiable success criteria, establish the funding thresholds required for progression to subsequent implementation phases, and designate governance checkpoints at which an explicit decision is made to scale, iterate, or discontinue the initiative. In parallel, organizations should establish an internal approval pathway for small-scale artificial-intelligence pilots that is distinct from, and less administratively burdensome than, the procurement process applied to capital equipment.

EXPECTED IMPACT

This approach is expected to convert isolated, ad hoc pilot activity into a structured and repeatable investment pipeline, thereby reducing the incidence of stalled or abandoned initiatives and improving the overall efficiency of capital deployed toward artificial-intelligence experimentation.

RECOMMENDATION 4 OF 6 — AI & INDUSTRIAL TECHNOLOGY ADVISORY

Data Readiness and Governance

HIGH

04

FINDING

Data quality and data governance received a mean readiness score of 2.3 out of 5.0, positioning this dimension among the lowest-rated readiness indicators measured in the survey — below even the rated readiness of digital infrastructure for scaling (2.5). This finding indicates that a considerable proportion of organizations may be initiating artificial-intelligence pilots without having first established the data foundations necessary to support reliable model performance or to enable an orderly transition from pilot to production. In the absence of adequate data governance, organizations are likely to encounter downstream performance and reliability issues that surface only after deployment, when the cost of remediation is materially higher.

RECOMMENDATION

Organizations should conduct a structured data-readiness assessment in advance of each new artificial-intelligence initiative, evaluating data completeness, accuracy, accessibility, and contextual relevance to the intended use case. Even in the absence of a comprehensive enterprise data strategy, organizations should establish minimum governance controls addressing data ownership, access management, and quality-assurance procedures, and should assign clear accountability for the maintenance of these controls over time.

EXPECTED IMPACT

Establishing baseline data governance is expected to reduce the incidence of model performance and reliability issues that, in practice, tend to emerge only after deployment, thereby lowering the cost, delay, and reputational risk associated with pilot failure.

A Differentiated Strategy for Mid-Size Enterprises

MEDIUM

05

FINDING

52.9 percent of respondent organizations report fewer than 500 employees, establishing that mid-size, resource-constrained enterprises constitute the majority of this survey's respondent population rather than a peripheral segment. This finding carries direct implications for the design of adoption strategies, which should not presume access to the capital reserves, specialized staff, or dedicated infrastructure typically available only to large national or multinational enterprises. Strategies formulated primarily around the operating context of large enterprises risk being inapplicable, or disproportionately costly, for the majority of organizations represented in this sample.

RECOMMENDATION

Mid-size organizations should pursue artificial-intelligence investment at a scale proportionate to their available resources, prioritizing partnerships with universities, research institutions, and early-stage technology providers as a means of accessing specialized expertise without incurring the fixed cost associated with full-time in-house hiring. Collaborative or shared-service arrangements, in which several mid-size organizations jointly fund access to specialized capability or shared infrastructure, merit further consideration as a cost-efficient alternative to independent capability-building.

EXPECTED IMPACT

This approach is expected to provide mid-size organizations with access to specialized artificial-intelligence expertise at a substantially lower cost than would be incurred through direct recruitment, while enabling participation in the broader technology ecosystem on commercially sustainable terms.

RECOMMENDATION 6 OF 6 — AI & INDUSTRIAL TECHNOLOGY ADVISORY

Performance Measurement and ROI Methodology

CRITICAL

06

FINDING

A gap of 0.83 points separates the mean rating for perceived process-efficiency improvement attributable to artificial intelligence (3.24 out of 5.0) from the mean rating for confirmed, measurable financial impact (2.41 out of 5.0). This divergence indicates the likely absence, across the majority of surveyed organizations, of a standardized methodology for quantifying the return generated by artificial-intelligence initiatives, resulting in investment decisions that are frequently informed by qualitative impression rather than by documented, comparable evidence. Absent such a methodology, organizations are also less able to identify and discontinue underperforming initiatives in a timely manner.

RECOMMENDATION

Prior to the launch of any artificial-intelligence pilot, organizations should define between two and three quantifiable success metrics directly aligned with the initiative's stated business objective, such as cost reduction, cycle-time improvement, or defect-rate reduction. A fixed evaluation checkpoint — for example, at ninety days following launch — should be established, at which an explicit decision to scale, iterate, or discontinue the initiative is formally documented and communicated to relevant stakeholders.

EXPECTED IMPACT

Implementation of a standardized measurement methodology is expected to enable evidence-based capital-allocation decisions, to reduce the incidence of indefinite pilot extension without a defined endpoint, and to improve the overall credibility of artificial-intelligence investment cases presented to senior leadership.

ADDITIONAL PERSPECTIVE

AI Research Report (AI expert contribution)

Dana Isabaeva

AI in Business Working Group Leader, British Chamber of Commerce in Kazakhstan, Survey Coordinator

The central question for Kazakhstan's industrial companies is no longer whether to adopt artificial intelligence. Every respondent in this survey named AI as a top priority. The real question is how to turn interest and pilot projects into sustained operational results. The research revealed the existing gap between ambition and execution. Companies show strong leadership support and readiness to experiment, yet organizational foundations — talent, data quality, vendor evaluation, and measurable success criteria — remain underdeveloped. Our aim was to give decision-makers a practical, shared reference point they can use to benchmark readiness, prioritize investments, and move beyond stalled pilots.

The findings confirm that the main barriers are organizational, not technological. Success depends on a strategic approach to AI adoption — when a company systematically builds capabilities in talent, data, and scaling processes, rather than limiting itself to isolated experiments. This is the approach that will convert today's pilot activity into lasting competitive advantage.

I am grateful to the members of our AI in Business Working Group, to the key contributors to the research from **Kazakh-British Technical University (KBTU)** and **Narxoz University**, and to every expert who shared their professional perspective and contributed to this report, for their expertise, commitment, and valuable support throughout all stages of this work.

ADDITIONAL PERSPECTIVE

AI Research Report (AI expert contribution)

Assel Akzhalova

Director of SDG projects department, Professor, Faculty of Information Technology Kazakh-British Technical University (KBTU), PhD in Computer Science (Kings College London, UK), PhD in Applied Math (Farabi University, Kazakhstan)

The key finding of this report and survey—the combination of high interest in AI with limited readiness for its implementation—is consistent with patterns documented in the broader literature on technology adoption in resource-constrained organizations. From a research perspective, universities can contribute to bridging this gap in at least two ways. First, as educational institutions, they prepare a workforce with the technical expertise necessary to responsibly design, evaluate, and maintain AI systems. Second—and this contribution is often underappreciated—as developers of independent, peer-reviewed research, universities provide the theoretical foundation that companies need, as they are rarely able to independently develop methodologically sound assessments of AI model performance, data quality, and implementation risks.

In the absence of such research, organizations are forced to evaluate AI tools primarily based on vendor claims rather than independently verified data. Organizations that view university partnerships and the resulting research outcomes as an integral part of their AI strategy are, in my opinion, better positioned to move from pilot experimentation to sustainable industrial implementation.

ADDITIONAL PERSPECTIVE

AI Research Report (AI expert contribution)

Bauyrzhan Yermagambetov

Deputy Director, Institute of Digital Transformation and AI, Narxoz University

Results of the survey suggest that Kazakhstan is exhibiting the same pattern observed globally: AI adoption is accelerating rapidly, while the transition to enterprise-scale deployment and the realization of sustainable business value are progressing much more slowly. Approximately 60% of respondents indicated that most AI initiatives within their organizations remain at the pilot stage, fewer than 20% reported limited operational deployment, and none identified AI as being implemented at full production scale.

At the same time, corporate ambitions are high. More than 70% of respondents plan to significantly expand their use of AI, while over 80% intend to launch additional pilot projects. However, executive support—rated at an average of 3.9 out of 5—is not yet matched by the underlying organizational and technological readiness. The average score for AI strategy was 2.2, data quality and data governance 2.3, infrastructure readiness for scaling 2.5, and the availability of dedicated AI teams 2.6.

International evidence confirms that this gap is not unique to Kazakhstan. According to McKinsey’s global State of AI survey, 88% of organizations already use AI in at least one business function, yet only 7% report having fully scaled AI across the organization. In other words, the adoption of AI technology is advancing considerably faster than organizations’ ability to redesign processes and capture value at scale.

ADDITIONAL PERSPECTIVE

AI Research Report (AI expert contribution)

Bauyrzhan Yermagambetov

Deputy Director, Institute of Digital Transformation and AI, Narxoz University

Our experience from applied industrial AI projects shows that this is precisely where many organizations struggle to move beyond successful prototypes toward sustainable production solutions. In industrial environments, achieving acceptable model accuracy is only one part of the challenge. Successful deployment requires an end-to-end operating framework: high-quality, context-rich production data, seamless integration with existing systems, clear and actionable recommendations for end users, systematic capture of operational decisions, and continuous measurement of real business outcomes.

For this reason, the next stage of industrial AI development in Kazakhstan will likely be defined not by the number of new pilot projects, but by organizations' ability to transform isolated experiments into a repeatable deployment model—supported by clear business ownership, a robust data foundation, active involvement of production specialists, and a transparent framework for measuring business impact.

ADDITIONAL PERSPECTIVE

AI Research Report (AI expert contribution)

Kanat Sarsekeyev

Head of Technology Consulting, EY Caucasus and Central Asia

In my assessment, the defining characteristic of this survey is not the gap between interest and deployment, which mirrors patterns observed globally, but the reason that gap persists. The data suggest that Kazakhstan's industrial companies have already resolved the two obstacles commonly assumed to hold back adoption: access to capital and executive backing. Pilots are being delivered for under fifty thousand dollars, and leadership support is rated higher than any other readiness dimension. What has not been resolved is considerably more fundamental: a shared understanding of what artificial intelligence is and, consequently, of what a company is actually acquiring when it invests in it.

This interpretation is supported by the structure of the reported barriers. Talent and internal expertise outrank cost, and the sourcing findings describe a market that evaluates technology partners almost exclusively through reference cases and prior implementations. Taken together, these results portray organizations that are prepared to spend but uncertain how to judge what they are buying. I would argue that the 88 percent of respondents who report difficulty assessing vendor quality are not facing an information deficit. They are applying an evaluation logic borrowed from conventional IT procurement to a technology for which that logic does not hold.

The conventional logic assumes that a use case is a finished product: a solution implemented at one company that can be replicated at another. On this assumption, requesting identical reference cases is entirely rational. It is the assumption itself that deserves scrutiny, and this is where, in my view, the findings of this report carry their most interesting implication.

ADDITIONAL PERSPECTIVE

AI Research Report (AI expert contribution)

Kanat Sarsekeyev

Head of Technology Consulting, EY Caucasus and Central Asia

Artificial intelligence is a technology, not a product. A solution deployed at one enterprise is a single application of that technology to one specific problem, shaped by that enterprise's data, processes and constraints. The instrument is transferable; the application, as a rule, is not. It follows that a use case is not something a company imports from elsewhere but something it formulates for itself, starting from its own business problem, and that the ability to work with the technology matters more than the possession of a catalogue of previously delivered solutions. Evaluating a partner through the demand for an identical prior case therefore measures the wrong variable: it rewards repetition where the task requires adaptation.

The practical implication is a change in evaluation criteria on both sides of the market. Technology partners should be assessed on demonstrated capability with the technology itself: the treatment of production data, the discipline of integration and delivery, and the measurement of business effect on the client's own operations. Companies, in turn, should be assessed, and should assess themselves, on their ability to translate operational problems into well-defined use cases. The organizations that adopt this framing first will, in my view, be the ones that convert the pilot activity documented in this survey into production systems, and they will do so not by copying what already exists but by learning to apply the technology to problems that are entirely their own.

ADDITIONAL PERSPECTIVE

AI Research Report (AI expert contribution)

Anarbek Utegulov

Director of Technology Centers Office, Astana Hub

This report confirms what we experienced at Astana Hub. Kazakhstani industrial companies have strong ambition but lack the internal structure to turn AI pilots into real, working systems. All companies name AI as their top priority, yet 58.8% stay stuck at pilot stage, and none reach full scale.

Two numbers stand out. The talent gap (3.71/5) is a bigger barrier than cost (3.53), confirming why we invest heavily in training and applied AI skills before adoption. Also, 88% of companies find vendors mainly through personal contacts, not verified sources. An international tech hubs like Astana Hub can solve exactly this problem, through trusted vendor catalogs and structured matchmaking that shorten the sourcing process, which today takes over a month for most companies

The report's own recommendations, building talent, checking vendors properly, planning the move to full scale, and setting ROI targets, match closely with what Astana Hub already offers. These are specialized accelerator programs connecting industrial companies with vetted AI startups, safe pilot environments with clear success metrics, and links to trusted vendors and research institutions.

ADDITIONAL PERSPECTIVE

AI Research Report (AI expert contribution)

Anar Tuleubayeva

Association for the Development of Artificial Intelligence in Kazakhstan, Vice Chair

The most important finding of this study is that the barrier to AI adoption in Kazakhstan's industry has shifted from technology to institutions. One hundred percent of respondents are interested in AI, while the average maturity score for AI strategy is 2.2 and for data readiness 2.3. Companies try the technology before they build a system to govern it, and this is precisely why pilots fail to become production solutions.

The competence of the people involved plays a major role here. It may also be worth taking a deeper look at the solutions being piloted: they may address only part of the tasks at hand, while customer expectations are set on comprehensive and costly systems. AI is not cheap. 2026 gave the market what it was missing: a legal framework. The Law on Artificial Intelligence has been in force since January, secondary legislation is under development, and companies now have transparency and labelling requirements, a voluntary audit mechanism, and reference points in the ISO/IEC 42000 series of standards. This is a ready-made governance framework that closes exactly the gaps the survey records: strategy, data management and impact measurement. The talent barrier, rated above cost (3.71 versus 3.53), confirms that investing in competencies today matters more than investing in licenses.

Our Association works on both fronts: we develop training programs and contribute to secondary legislation so that national rules are workable for business and harmonized with international norms. Kazakhstan's industrial AI will compete in the global market if we build it to global standards, and building it that way from day one is cheaper than rebuilding it later.

ADDITIONAL PERSPECTIVE

AI Research Report (AI expert contribution)

Zhanibek Mukhamejanov

President, Kazakhstan Association of Electronics Industry (KAEI)

The report accurately reflects the situation in Kazakhstan's electronics and AI infrastructure sectors: the gap between interest in technology and practical results is primarily structural. Companies rate the shortage of talent and expertise (3.71) as a greater barrier than implementation costs (3.53), while 88% rely on personal connections rather than trusted institutional channels to find technology partners.

To bridge this gap, KAEI is building a practical cooperation infrastructure. On 5 August 2026, the Association organized Kazakhstan's national venue for the International Meeting on Artificial Intelligence Cooperation among SCO Countries. The main venue was in Tianjin. More than 120 participants registered, and approximately 40 companies and organizations attended in person at Astana Hub.
In my presentation, I proposed a mechanism for launching joint projects in AI, electronics and robotics. Each pilot should bring together four parties: an enterprise with a specific operational challenge; a technology company offering a proven solution; a Kazakh integrator responsible for deployment and ongoing support; and a university or research organization contributing to workforce development and performance evaluation.
Each pilot should have a clearly identified customer, budget, timeline and measurable indicators, including productivity gains, lower costs and downtime, improved quality and safety, local specialists trained, and scalability. International cooperation should deliver not only technology, but also knowledge transfer, local engineering and service teams and, where demand is proven, the gradual localization of solutions.

The role of a national industry association is to create a structured channel for accessing technologies, expertise and reliable partners. The next stage should therefore focus not simply on increasing the number of pilots, but on building institutions capable of translating international cooperation into practical industrial solutions, new capabilities and a sustainable technological base in Kazakhstan.

ABOUT THIS DATA

How to use this report responsibly

Sample size

17 respondents is a qualitative read on decision-makers' sentiment, not a statistically significant estimate for the whole economy.

Self-reported

Data on implementation results, budgets, and effectiveness scores were not independently verified.

Selection bias

Taking this survey implies existing interest in AI — overall engagement across the industry may be lower.

Use this report as a starting point for a conversation with your leadership team about AI strategy — not as a final verdict on the market.

BRITISH CHAMBER OF COMMERCE IN KAZAKHSTAN

NARXOZ UNIVERSITY

KBTU KAZAKH-BRITISH TECHNICAL UNIVERSITY

FINAL SUMMARY

Thank you

AI Adoption and Technology Sourcing in Kazakhstan's Industrial Companies

CONTRIBUTING ORGANIZATIONS

British Chamber of Commerce in Kazakhstan · Narxoz University · KBTU

This assessment was prepared by a cross-functional team of AI, data, and industrial-technology specialists.