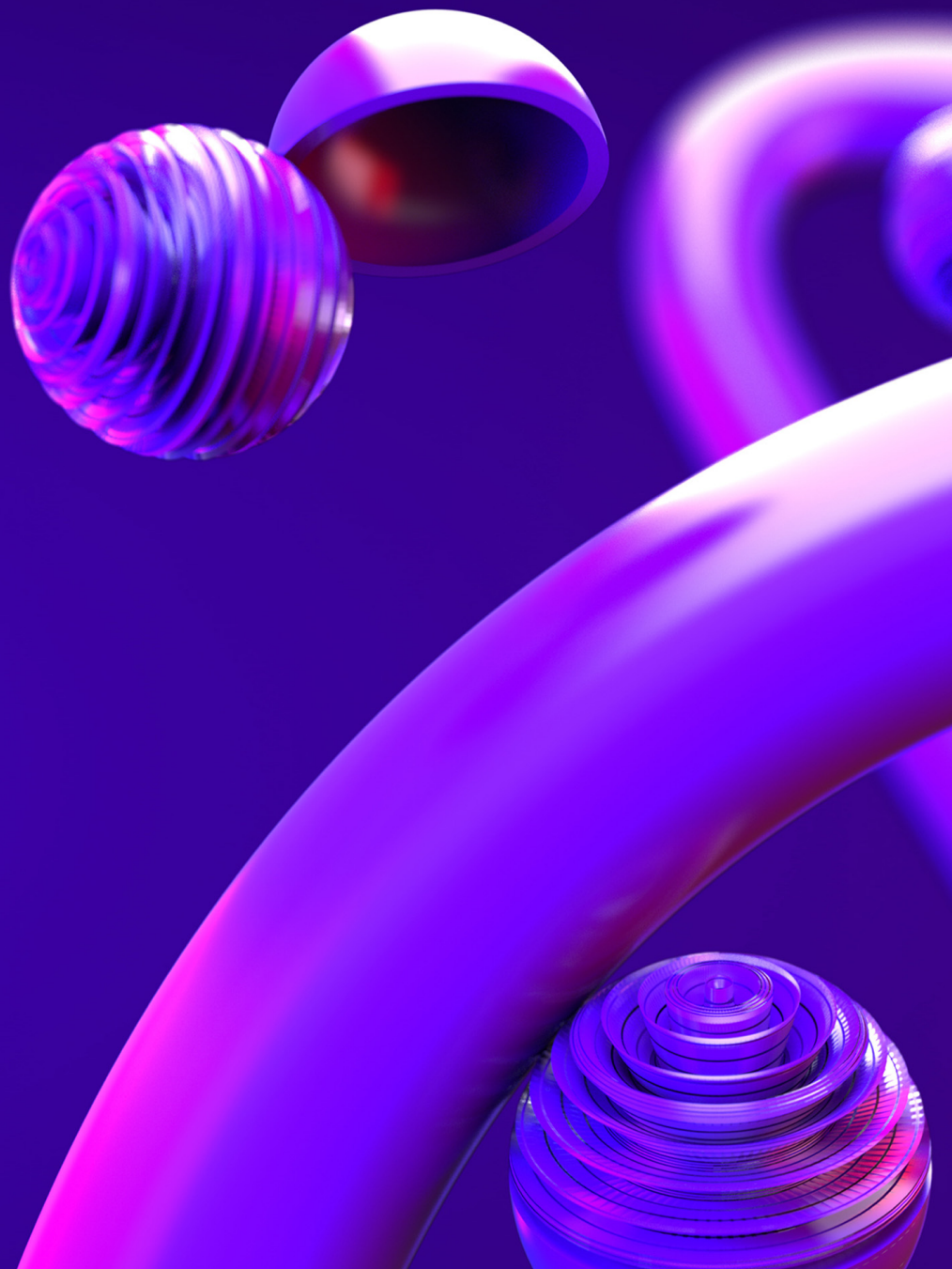




# CPO Outlook 2025

KPMG. Make the Difference.



# Foreword

We are pleased to present the results of the CPO Outlook 2025 survey, which explores the current state and future direction of development of procurement function in Kazakhstan, Uzbekistan, and for the first time – the rapidly evolving market of Azerbaijan.

This report offers more than just a snapshot of today's supply function. It serves as a strategic reference point for executives aiming to build adaptive, technology-driven, and resilient supply chains in the face of geopolitical uncertainty, digital transformation, and rising expectations from both business and society.

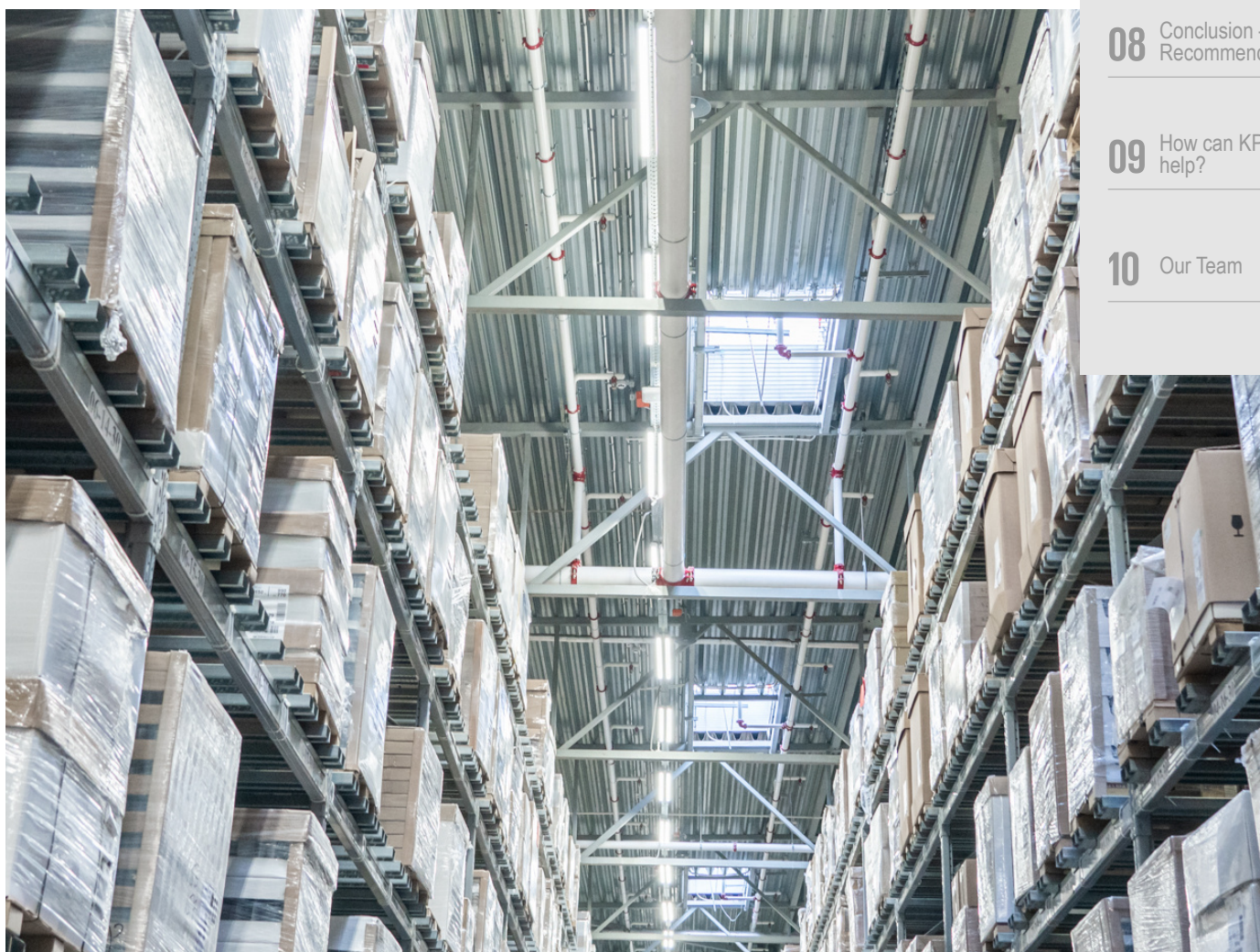
The objective of this research is to identify the key trends and strategic priorities shaping the procurement function in 2025, as well as to assess the changes observed over the previous period.

Since 2022, our research has tracked the evolution of procurement, highlighting key trends, challenges, and best practices. Initially focused on supply continuity, the function has gained strategic importance – influencing business planning and driving long-term corporate objectives. With expanded regional coverage, the research now enables cross-country comparisons and reveals both shared and country-specific trends across Central Asia and the Caucasus.



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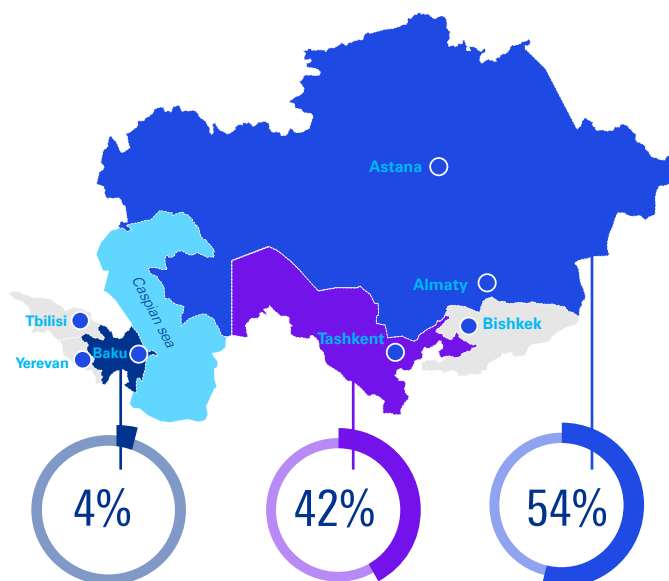
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# Participants

Professionals from Kazakhstan (54%), Uzbekistan (42%), and Azerbaijan (4%) participated in the survey, representing a wide range of industries – from mining and IT to retail and transportation and all management levels, from specialists to top managers.

Despite differences in process maturity and organizational approaches across the three countries, the survey enabled a comparison of perspectives and provided deeper insights into the key challenges faced by procurement teams across companies of different sizes and sectors.



Compared to 2024, the participant profile has demonstrated a considerable change: the share of respondents from the mining and metals industry increased (from 6% to 21%), the information and communications sector (from 6% to 17%), and the oil and gas industry (from 6% to 13%). At the same time, participation declined in the transport and logistics sector (from 16% to 4%), as well as in construction and railway.



**Mining and metallurgy**



**Other industries,**  
Textile and chemical Industry,  
manufacturing



**Information and communication**



**Oil and gas**



**Retail**



**Financial and insurance**



**Railway**



**Construction**



**Transportation and warehousing**

The share of executive respondents increased significantly (30% in 2024), strengthening the strategic focus of the study's findings. This shift in respondent profile reflects the growing involvement of senior leadership in the transformation of the procurement function – from digitalization and sustainable sourcing to supply chain risk management.



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# Key Trends of 2025

Based on the results of the 2025 survey, we identified **four key trends** shaping the future direction of the supply function.



## Artificial intelligence and digitalization

are becoming an integral part of the modern supply model – from automating routine tasks to risk forecasting and optimizing decision-making. Advanced digital solutions are already reshaping the procurement landscape, unlocking new opportunities in automation, demand forecasting, risk management, and process optimization. Despite the high potential of these technologies, procurement leaders still face the challenge of defining priority areas for digital investment that deliver measurable impact.



## Procurement transformation

– a shift from an operational to a strategic function with high added value. Procurement and logistics departments will now have to adapt even more actively to digital tools, upgrade their skills and take on new roles. Key focus areas include data management, AI-driven modeling, cost analytics, and the expanding responsibilities of category managers and logistics specialists.



## Talent acquisition and development.

In the context of digital transformation, human capital is emerging as the key asset driving the success of the procurement function. Our report highlights how companies across the region are building expert teams – from talent acquisition to development programs and retention of top supply chain professionals.



## ESG.

Green and sustainable procurement is moving to the forefront – not as a passing trend, but as a response to the expectations of regulators, investors, and customers, and as a key element of long-term strategy. Companies are increasingly re-evaluating their approaches to supplier selection and supply chain management, placing a strong emphasis on environmental and social responsibility.

**This report summarizes the best practices of companies in Kazakhstan, Uzbekistan, and Azerbaijan, backed by real data and in-depth analysis. Built on deep regional insight, it offers practical guidance on organizational design, digital tools, talent development, and integrating sustainability into daily operations.**

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# Artificial intelligence and digitalization

Artificial intelligence, particularly in the area of generative solutions, is opening up new opportunities to improve procurement efficiency – from automating routine operations to supporting analytics and decision-making.

In May 2025, the most powerful supercomputer in Central Asia was launched in Kazakhstan, housed in a newly established data center under the Ministry of Digital Development, Innovation and Aerospace Industry (MDDIAI). The system is equipped with NVIDIA H200 GPUs and delivers computing performance of up to 2 exaflops. MDDIAI emphasizes that the supercomputer’s resources are not intended for a narrow group of specialists but for the development of the country’s digital ecosystem: healthcare, energy, education, public services and business. Access is open to startups, universities, research centers and companies implementing AI in their processes – from training neural networks to big data analysis.

The development of such infrastructure lays the foundation for the large-scale application of AI in procurement. Artificial intelligence can:



Accelerate tender procedures from weeks to hours



Increase the accuracy of forecast and market analytics

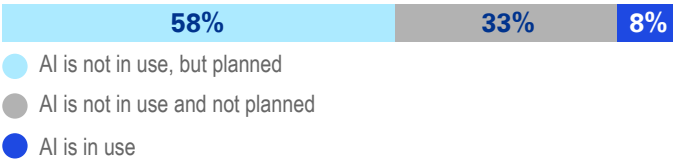


Conduct global supplier analysis



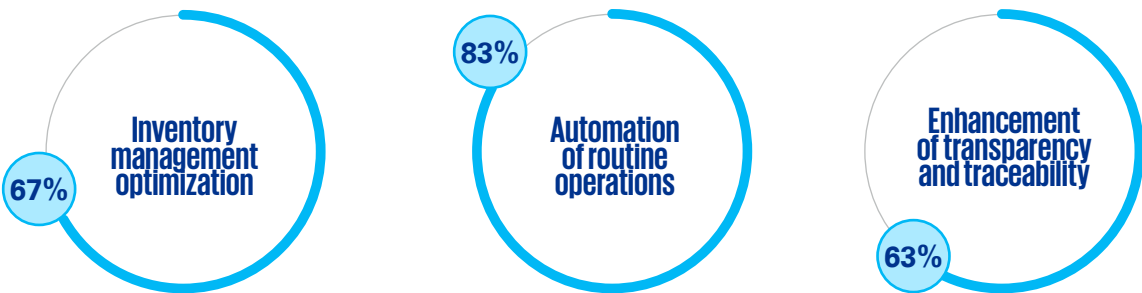
Free up teams from routine tasks and allow them to focus their efforts on strategic objectives

Despite growing interest in AI in procurement, its actual implementation remains limited. According to the survey results, only 8% of respondents currently use AI in practice.



Artificial intelligence offers fundamentally new opportunities for optimizing procurement processes – from cost reduction to improving the speed and reliability of decision-making. It enables automation of routine operations, enhances forecasting accuracy, facilitates adaptation to external disruptions and helps build more resilient supply chains. Given that 58% of respondents indicated plans to implement AI in the near future, it can be concluded that businesses recognize the strategic importance of the technology and view it as a key tool for improving operational efficiency. This reflects a clear shift from interest to action – toward active digital transformation of the procurement function.

Based on respondents’ perspectives, the TOP-3 priority areas for digitalization and for improving the overall operational efficiency of the procurement process were identified:



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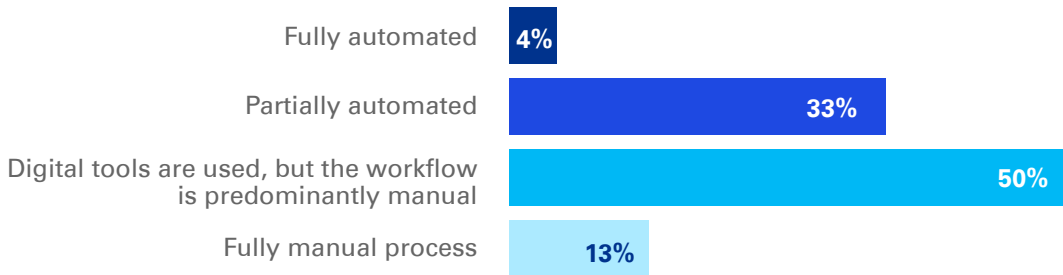
In the context of increasing instability in global supply chains – from geopolitical conflicts to logistics disruptions and raw material shortages – leading global companies are actively implementing AI tools to enhance the resilience and adaptability of their operating models.

Many companies from Fortune 500 are already using generative AI (GenAI) in partnership with technology platforms to:

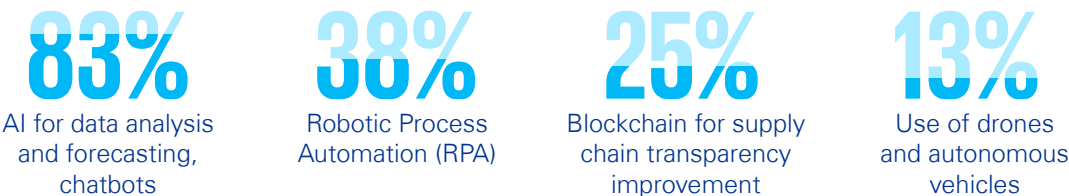
- model complex supplier networks;
- forecast potential risks and vulnerable links;
- rapidly identify alternative suppliers in case of disruptions;
- ensure compliance with regulatory and ESG requirements through traceability platforms.

AI enables a shift from reactive to proactive supply chain management – with the ability to analyze “what-if” scenarios in real time, consider external shocks (such as export restrictions or natural disasters) and make informed decisions before critical consequences occur. Thus, artificial intelligence is becoming not just a technology, but a key tool for sustainability and strategic planning for the largest players in the global market.

Despite the global trend and active promotion of AI in developed economies, the process of digital transformation in procurement is still at an early stage in Central Asia and Azerbaijan. According to a survey conducted among companies in Kazakhstan, Uzbekistan and Azerbaijan, 50% of respondents noted that their organizations are already using some digital tools – such as electronic requests, spreadsheets and basic ERP systems. However, in most cases, core processes remain manual and heavily reliant on human input. This indicates that digitalization is still fragmented and does not yet cover the entire procurement cycle – from planning to post-contract monitoring. As such, there remains significant potential for companies in the region to adopt comprehensive solutions, including AI, and to transition from manual to intelligent procurement management.



Considering the current challenges and trends in procurement sphere – from global instability to the need for digitalization – respondents identified specific areas they consider most promising for development in the next 12-18 months.



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# Talent acquisition and development

Development of human capital is key to future competitiveness.

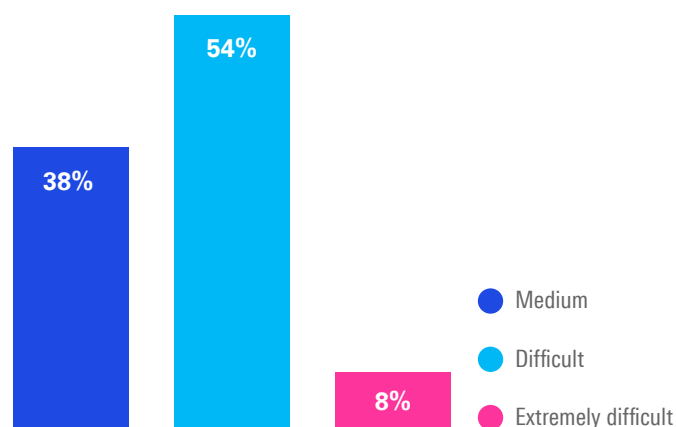
In a period of rapid digitalization and global transformation in supply chain management, human capital is becoming an essential asset for companies. Competent, motivated, and technologically proficient employees form the foundation of resilient and adaptive supply chain operations. Investing in talent development is not an expense, but a strategic necessity for companies aiming to maintain their market position and respond effectively to future challenges.

According to the survey results, there has been significant progress in employee qualification levels. In 2024, only 14% of respondents rated their employees' qualifications as high, while 80% considered them satisfactory and 6% low. By 2025 the proportion of highly qualified employees increased markedly to 54%, with 42% remaining at a satisfactory level and only 4% assessed as having low qualifications.

This positive trend reflects the impact of corporate training programs, upskilling initiatives, and internal talent development efforts.



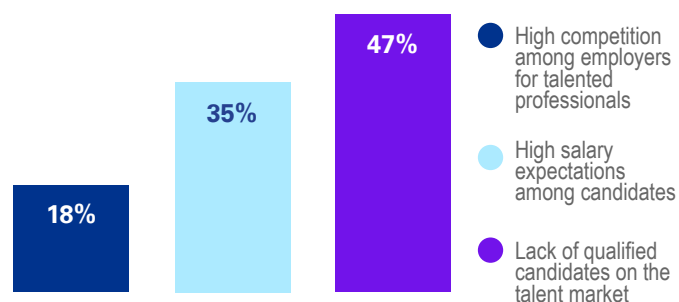
## Difficulty in sourcing competent talent



Despite progress in talent development, many companies continue to face significant challenges in recruiting procurement and supply chain professionals.

Our recent survey showed that 54% of respondents described the recruitment of qualified candidates as "difficult," 38% assessed it as "medium," and only 8% indicated it was "extremely difficult." These results highlight a persistent shortage of talented and competent professionals with the knowledge and skills required for effective supply chain management.

## Key challenges in candidate recruitment:



Respondents identified the following as the main factors contributing to the issue: lack of qualified candidates (47%), high salary expectations (35%), and high competition among employers for talented professionals (18%). These findings point to the need for a more systematic approach to workforce development and a reassessment of talent attraction and retention strategies in procurement and supply chain functions.

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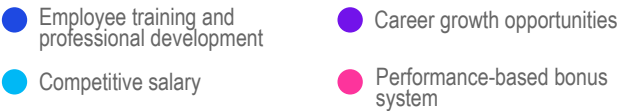
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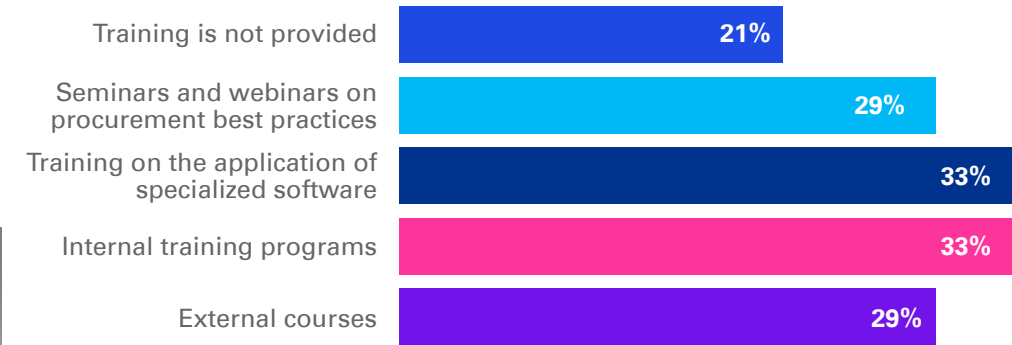
As organizations face a shortage of qualified professionals and growing competition for talent, they are increasingly taking steps to motivate and retain their workforce.

According to the survey, the most common measures implemented by organizations include offering competitive salaries, creating clear career growth opportunities, implementing bonus programs to reward top performers, and investing in employee training and upskilling. These approaches not only help strengthen employee loyalty and engagement but also contribute to building a stable talent base for the successful development of procurement and supply functions.

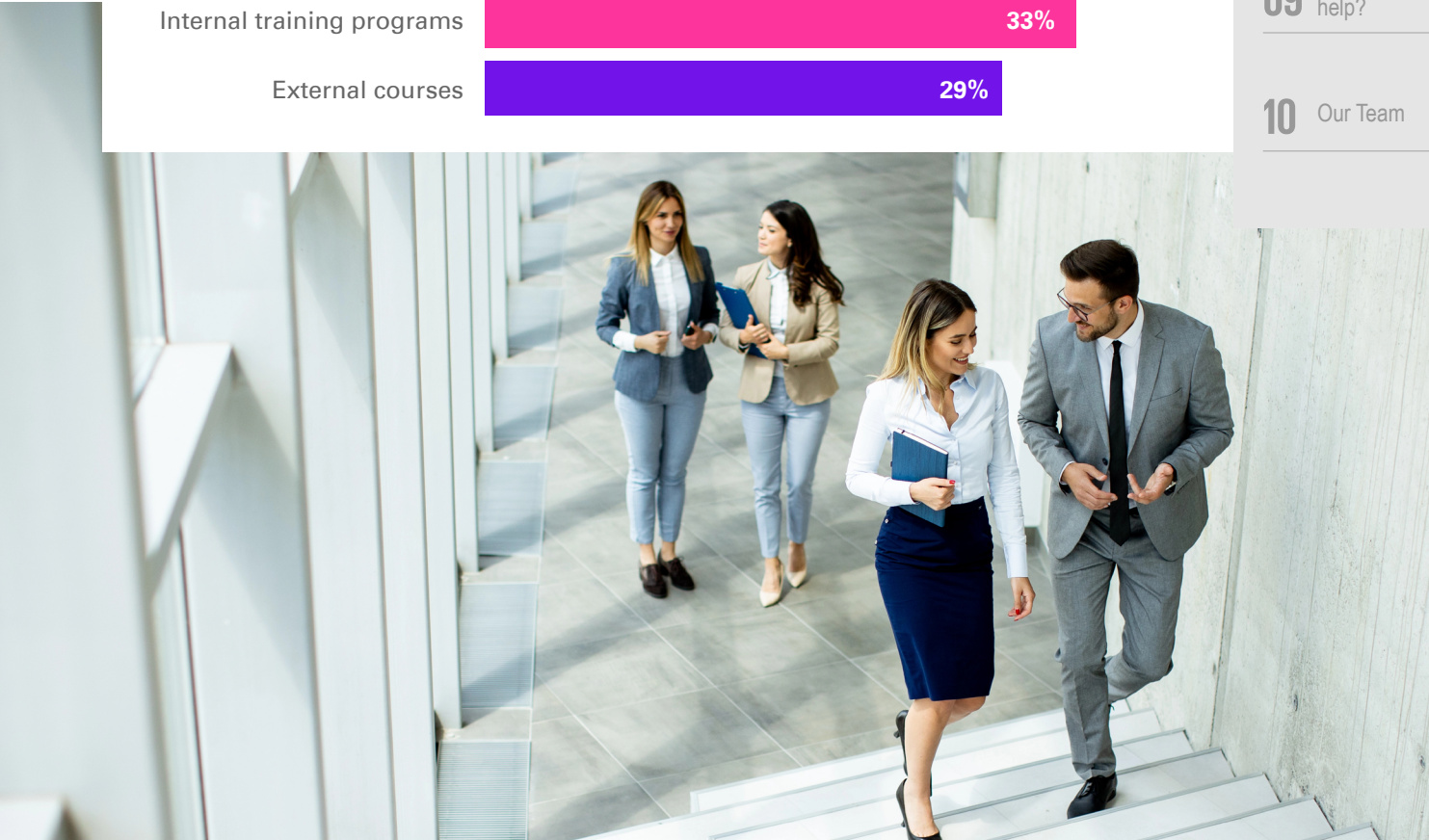


The effectiveness of the procurement function largely depends on the level of professional training and the willingness of employees to adopt new tools and technologies. To assess current practices, companies were surveyed about the training formats they use to develop their specialists. The findings highlight that, while some organizations focus on building employee competencies and digital skills, many still maintain a low level of systematic training and development within this critical business function.

How companies develop procurement personnel:



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# Procurement transformation

Digitalization remains a key driver of transformation and optimization of business processes in procurement. However, today it goes beyond automation – evolving into a comprehensive strategy of rethinking the role of procurement within the company.

Modern digital technologies not only streamline operations, but also create an ecosystem of data, transparency and proactive management. One of the key components is intelligent digital platforms, which connect supply chain participants, ensure end-to-end transparency across all stages of goods, services and workflows and enable rapid decision-making.

## Key technology trends accelerating in 2025



### Integrated supply chain management systems (SCM 2.0)

Modern SCM platforms operate in real time, integrate with ERP, SRM, WMS and TMS systems and enable rapid response to external changes – from demand fluctuations to logistical risks.



### Artificial intelligence and machine learning (AI/ML)

AI enables demand forecasting, automatic supplier segmentation, adaptive pricing and what-if scenario analysis. It plays a key role in the shift from reactive to predictive supply chain management.



### RPA (Robotic Process Automation)

Automation of repetitive tasks such as order verification, data matching, logistics parameter calculation, or KPI tracking allows employees to focus their efforts on more strategic functions.



### Big Data and intelligent analytics

Modern platforms enable real-time processing of large volumes of data by combining internal information (purchasing, inventory, costs) with external data (markets, risks, ESG factors). This fosters a new decision-making culture – data-driven procurement.

Many companies continue to face a range of systemic procurement challenges, even as they actively advance digitalization and transformation initiatives. These issues can significantly impact supply efficiency, increase operational costs, and hinder the achievement of strategic business objectives. As part of the study, participants were asked to identify **the main challenges their companies face in the current procurement processes**. The responses provide deeper insight into the barriers slowing the development of the procurement function and help highlight areas that require priority attention from management and project teams.

63%

Duration of approval procedures

50%

Low level of automation

38%

Challenges in supplier sourcing

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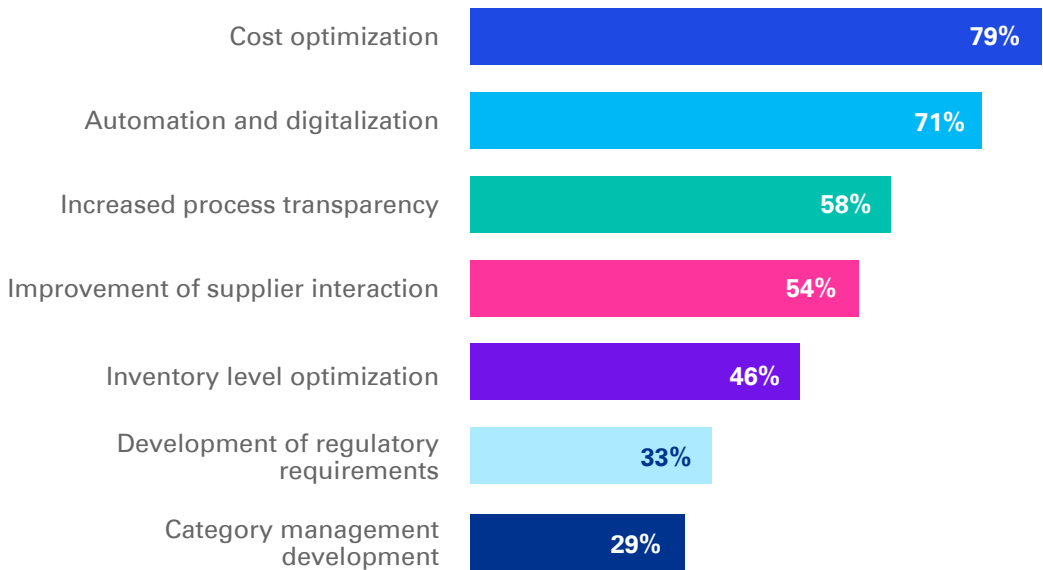
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Survey findings indicate that companies are prioritizing digital procurement initiatives, despite facing a range of transformation challenges such as technical limitations and talent shortages.

Over 80% of respondents named automation of procurement processes as the most beneficial aspect of digital transformation. This includes automated processing of requests and purchase orders, contract performance monitoring, electronic document management, supplier integration, and the use of intelligent algorithms to support decision-making.

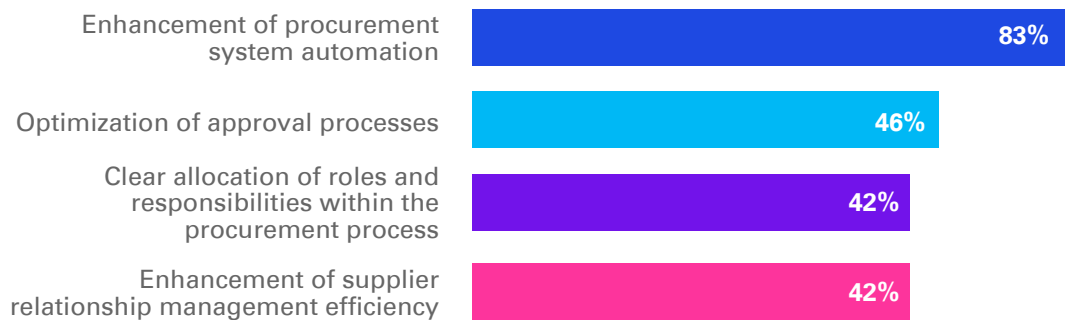
The survey revealed the following priorities set for the procurement function during the transformation process:



To assess the maturity of external collaboration practices, respondents were asked the following question: **“How do you assess the importance of supplier collaboration in strategic initiatives, such as innovation or quality improvement?”** The responses provided insights into how prepared companies in the region are to shift from transactional relationships to long-term partnerships based on mutual benefit and shared value.



The top four procurement processes with the greatest potential value, as perceived by respondents, are as follows:



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# ESG

Sustainable development is increasingly becoming part of the agenda for corporate supply chain functions – especially in the context of growing expectations from customers, partners and regulators.

In international procurement practices ESG (Environmental, Social, and Governance) principles are no longer seen merely as a reputational bonus but as a factor directly impacting the stability of supply chains, investment attractiveness and the long-term competitiveness of businesses.

A survey conducted among companies in Kazakhstan, Uzbekistan and Azerbaijan showed that the transition to sustainable procurement practices remains at an early stage. This highlights the need for further development of methodological frameworks and integration of such approaches into corporate processes. Only 42% of respondents include environmental and social criteria into their decision-making processes when selecting suppliers.

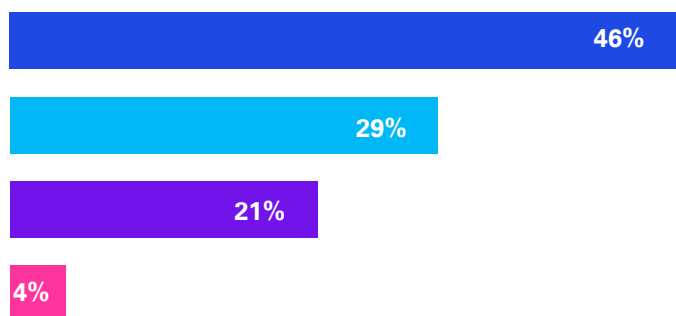
**42%** Yes  
**58%** No

The survey results revealed that the practice of including environmental and social commitments in contracts with partners has not yet become widespread, although there are clear signs of future growth.

Only 17% of companies include comprehensive requirements for both environmental and social standards in contracts with suppliers. Another 17% limit themselves to either the environmental or the social component. The overwhelming majority of respondents (66%) currently do not use legally binding ESG clauses in their contracts, although some are considering their implementation (33%) or already provide recommendations to partners (8%). This indicates that the inclusion of ESG standards in supplier contracts in the region is not yet a common practice.



**The analysis of the responses to the question “Do you give preference to local suppliers?” showed the following:**



- Yes, but we also consider international suppliers
- Yes, we prioritize local suppliers
- Supplier selection is based on other criteria
- No, we primarily work with international suppliers

Localization of procurement is increasingly viewed as an important element of sustainable procurement strategies. This approach not only helps to reduce logistics costs and lower the carbon footprint but also supports the development of regional economies. At the same time, perspectives on procurement localization across Central Asian countries remain varied. The majority of respondents (67%) follow a more complex approach in selecting suppliers: they consider both local manufacturers and international partners, taking into account various factors such as price, reliability and delivery times. This response structure suggests that localization is not yet seen as an independent objective, but rather as a compromise balancing sustainability and accessibility.

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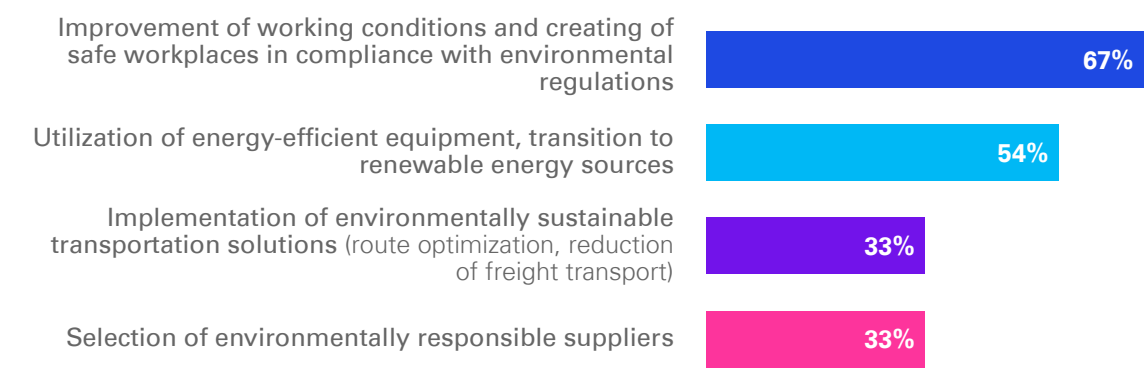
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While ESG standards have not yet been widely adopted, some companies are already demonstrating readiness to implement sustainable practices. The most notable efforts are related to social changes – primarily in the areas of occupational health and safety improvements (67%).

To reduce their environmental impact and improve sustainability, respondent companies take the following steps (respondents could select multiple options):



Environmental initiatives aimed at improving energy efficiency are also gradually gaining popularity: more than half of the surveyed companies are implementing energy-saving equipment and beginning the transition to renewable energy sources. Another third of respondents are investing in eco-friendly logistics solutions and prefer suppliers who share their environmental values. According to the survey, companies pay the least attention to strategic planning and innovation: only one-fifth of respondents reported implementing measures to reduce excess costs through more accurate planning, as well as supporting research in sustainable technologies. The implementation of such measures generally requires mature management practices and a strategic approach to ESG, which are still in the development stage in most companies in the region.

The most useful sustainable procurement initiatives for respondent companies were:



In a context of the early adoption of green and sustainable procurement practices, businesses particularly feel the need for external support and practices aimed at integrating sustainability principles into procurement activities. When asked which initiatives could have the greatest impact, most companies (29%) indicated that the development of ESG in procurement would be supported by professional engagement with other companies in the industry – through experience sharing and joint projects. 25% of survey participants emphasized the importance of systematic training and upskilling of employees. A quarter of companies cited subsidies and tax incentives as helpful measures to offset the costs of transitioning to more sustainable solutions. Another 21% of respondents expressed interest in access to digital platforms for finding sustainable suppliers, indicating a need for infrastructure that simplifies ESG integration. These results confirm that the implementation and development of sustainable practices require a consistent and structured approach, involving both internal changes and external support.

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# Conclusion – Recommendations

Our research shows that procurement leaders aren't just reacting to changes; they're becoming drivers of sustainable digital transformations.

This requires a strategic focus on automation, ESG integration, talent development, and embedding digital solutions into core business processes.



## Artificial intelligence and digitalization

The application of AI and digital technologies offers companies new opportunities: automation of routine tasks, reduction of procurement processing time, and increased transparency and manageability of processes. However, current practice indicates fragmented technology adoption; most companies are still in the planning phase, and key stages of the supply chain remain dependent on manual labor and human factors.

To ensure sustainable results, it's crucial for organizations to transition from isolated initiatives to comprehensive digital transformation. This involves integrating technologies at all levels, developing digital competencies, and building a solution architecture capable of adapting to new challenges and supporting growth.



## Procurement transformation

Procurement transformation is evolving beyond the automation of individual processes, becoming part of a broader strategy for sustainable development and increased operational efficiency. Integrating digital solutions, analytics, and modern technologies into supply processes allows companies to adapt more quickly to external challenges, improve risk management, and build more transparent and manageable supply chains. To gain the maximum benefit from this transformation, a comprehensive approach is required – ranging from revising the organizational model to developing digital competencies and fostering a sustainable culture of change.



## Talent acquisition and development

In the current environment of accelerated digitalization and automation, human capital has become a critical driver of procurement performance. Traditional roles are evolving, creating growing demand for professionals with expertise in analytics, digital solutions, and sustainability.

Companies are rethinking their approach to talent management – from recruitment to training and retention. Leaders are encouraged to regularly reassess skill requirements in response to technological and market shifts, and to invest in building internal capabilities, particularly in digital tools, data analysis, and supply chain risk management.



## ESG

Developing sustainable procurement requires not only adjusting individual procedures, but also a complete rethinking of the entire supplier interaction model. A consistent approach is recommended: start with an assessment of current risks, identify priority areas (e.g., energy efficiency or labor conditions within the supply chain), and formalize sustainability requirements through policies and contractual frameworks. Sustainability in procurement is not a one-off measure, but a strategic process that increases supply chain reliability and stakeholder trust.

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# How can KPMG help?

## 1 Comprehensive assessment of supply chain management function

In today's dynamic environment, timely identification of weak points and hidden risks in supply chains is becoming increasingly critical. Our experts perform a comprehensive diagnostic of the procurement function, focusing on bottlenecks and risks that may compromise its stability. The assessment includes elements of forensic analysis, enabling early detection of vulnerabilities, improving operational transparency, and providing evidence-based recommendations for optimization. The key output is a diagnostic report highlighting inefficiencies and offering tailored improvement suggestions. If needed, we also develop a detailed roadmap with an action plan to enhance operational efficiency and ensure long-term resilience.

## 2 Enhancement of Master Data Management (MDM)

High-quality and well-structured master data is a critical foundation for implementing AI-based solutions. We assist companies adopt a systematic approach to updating and standardizing their MDM, classifying catalogs using hierarchical and facet methods, eliminating duplicate entries, and improving overall data quality. Implementing these measures not only enhances the accuracy of analytics and enables automation of routine tasks, but also lays a solid groundwork for adopting intelligent solutions in procurement and supply chain management.

## 3 Integrated Demand Planning

Integrated planning offers the flexibility required to operate at varying levels of detail, aligning long-term objectives with current needs. We support companies in designing a unified planning model where the same data serves as the foundation for both strategic decisions and day-to-day execution. This enables the synchronization of demand, supply, and inventory planning, enhancing forecast accuracy, process transparency, and the real-time manageability of the entire supply chain.

## 4 RPA (Robotic Process Automation)

Automating routine operations through RPA is one of the most effective steps toward improving the operational efficiency of the procurement function. Our team can help identify processes with the highest potential for automation, assess them, and provide evidence-based recommendations for optimization. This approach reduces the workload on procurement teams, increases operational accuracy, and creates a foundation for scalable process digitalization.

## 5 Transformation of the procurement operation model

The procurement function is at the heart of operational and strategic changes. We help in developing a target operating model for procurement – including optimizing the organizational structure, revising roles and responsibilities, updating key processes, developing and implementing KPIs, introducing management reporting and collaboration mechanisms with internal stakeholders. This approach allows the function to adapt to evolving business requirements, enhance its maturity, and lay the foundation for further digitalization and sustainable growth.

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# How can KPMG help?

## 6 Training workshops

Training workshops and capability-building programs not only enhance staff competencies but also serve as effective tools for implementing best practices and adapting to rapidly changing market conditions. We offer comprehensive training programs and workshops focused on the practical application of knowledge in demand planning, procurement, and inventory management. Throughout the training, participants gain insights into modern supply chain optimization approaches, learn category management methodologies, digitalization tools based on ERP systems, and strategies for improving operational efficiency.

## 7 Strengthening the ESG initiative

ESG factors are becoming an essential element in supplier management, supply chain design, and ensuring transparency in procurement processes. Companies that consistently integrate sustainable practices into their procurement activities gain competitive advantages – from increased investment appeal to stronger trust from clients and partners. Our role is not only to assess how well sustainability principles are embedded in the procurement system – including supplier selection, evaluation, and engagement processes – but also to support the implementation of green procurement practices that account for the total cost of ownership across the full lifecycle, from acquisition to disposal.



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