



Report based on results of the surveys with private companies to identify potential ways of cooperation with the academic sector

According to the project «Set-up of an SDGs Platform for Central Asia» (SDG Space)

July 2024

Abbreviations and terms

United Nations Global Compact	Non-binding United Nations pact to get businesses and firms worldwide to adopt sustainable and socially responsible policies, and to report on their implementation. The UN Global Compact is the world's largest corporate sustainability and corporate social responsibility initiative, with more than 20,000 corporate participants and other stakeholders in over 167 countries.
EU	European Union
UNDP	United Nations Development Program
SDGs	The Sustainable Development Goals (SDGs), also known as the Global Goals, were adopted by the United Nations in 2015 as a universal call to action to end poverty, protect the planet, and ensure that by 2030 all people enjoy peace and prosperity. The 17 SDGs are integrated - they recognize that action in one area will affect outcomes in others, and that development must balance social, economic and environmental sustainability
ESG principles	Environmental, social and governance principles, are sustainability-oriented guidelines. They provide a framework for understanding the sustainability performance and development opportunities of a business
SDG Space	SDGs Platform for Central Asia

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Introduction

In order to promote sustainable development in the region, the European Union (hereinafter – the EU) and the United Nations Development Programme (hereinafter – UNDP) have joined forces and launched a project to create a regional platform for Sustainable Development Goals (hereinafter – SDGs) for Central Asia (hereinafter – the Project). The overall goal of the Project is to contribute to sustainable development through a knowledge sharing platform, as well as the creation of innovative solutions to support the achievement of the SDGs in the Central Asian region.

The Project will create a unique digital platform “SDG Space”, which will allow its participants to interact online, exchange ideas and communicate to translate ambitious ideas into projects in support of sustainable development.

SDG Space will support the cooperation of various stakeholders, in particular, significant attention will be paid to the creation of a sustainable partnership between the private sector and the academic sector, which in turn will contribute to the commercialization of projects aimed at sustainable development.

The implementation of the SDG Space platform is also aimed at supporting one of the large-scale initiatives of the United Nations Global Compact to involve the private sector in the process of transition to more sustainable development strategies.

To implement the Project to create the SDG Space platform, UNDP attracted Almaty Management University to provide expert and analytical support.

This report was prepared by Almaty Management University (AlmaU) based on the results of a survey among private companies to determine ways of cooperation with the academic sector.

Executive Summary

- The purpose of the study was to examine the awareness of private companies regarding sustainability issues and to identify potential avenues for collaboration with the academic sector.
- The study consisted of two stages: 1) designing and conducting a basic survey to collect data from companies across various economic sectors to determine their level of awareness and activity in sustainability, targeting at least 100 companies; 2) conducting an in-depth survey with representatives of those companies who expressed interest in participating in or implementing sustainability-related projects and considering the integration of sustainability principles into their operations.
- Google Forms was chosen as the platform for conducting the surveys due to its accessibility, ease of use, and data collection automation. The platform offers a high level of security, an intuitive interface, and compatibility with other Google services, facilitating data analysis and management.
- The basic survey consisted of 6 general questions and 6 main questions. A total of 109 companies out of 480, primarily from AlmaU's client and partner base, participated in the survey, resulting in a response rate of less than 25%.
- The in-depth survey consisted of 4 general questions and 24 main questions. Representatives from 30 companies participated in this survey out of 77 representatives from the basic survey who expressed interest in sustainability projects, indicating a broad interest in the research topic.
- The in-depth survey included questions about the integration of sustainability elements and ESG into corporate development strategies, the presence of qualitative and quantitative sustainability goals and their connection to the Sustainable Development Goals (SDGs), as well as factors influencing the integration of sustainability into the strategy.
- The in-depth survey included questions regarding existing needs for projects directly or indirectly related to sustainability, topics for joint projects with the academic sector, questions about companies' willingness to collaborate with the academic sector in the field of sustainability, and potential formats for such collaboration.
- The survey showed a diversity of participants. Representatives from large, medium, and small companies from various industries and regions of Kazakhstan, most of whom have been in operation for over 10 years, participated in the survey.
- Most companies (over 70% of those who responded to the basic survey) demonstrated a high or partial level of awareness about sustainability principles and ESG, as well as the integration of sustainability elements into their development strategies. This indicates a growing understanding of the importance of these issues for business and is a positive sign for future company initiatives.
- The surveyed companies have an interest and need for sustainability-related projects. More than half of the companies are interested in collaborating with the academic sector on sustainability issues, achieving SDGs, and implementing ESG principles.

Results of the survey among private companies

Almaty Management University developed and agreed with UNDP two questionnaires (simple and in-depth) for subsequent distribution to private companies.

1. Simple questionnaire

The simple questionnaire for yourself 6 general questions and 6 basic questions (see Appendix 1).

The simple questionnaire was conducted on the Google Forms platform.

The study aimed to collect and analyze data from companies across various economic sectors to determine their level of awareness and activity in sustainability (SDGs) and environmental, social, and corporate governance (ESG). The basic survey was sent to 480 companies, and 109 companies responded and completed the questionnaire, representing a 22.7% response rate.

The 109 participating companies represented a wide range of economic sectors. The survey questions covered aspects related to general company information, number of employees, duration of operations, positions of respondents, regional activities, awareness of sustainability principles, presence of ESG strategies, practical steps towards sustainability, and interest in participating in relevant projects.

Sector 1: General information about companies

The first section of the study provides a detailed overview of the general characteristics of the companies that participated in the survey. It includes information about the economic sectors they operate in, company sizes, number of employees, duration of operations, and positions of the respondents.

1.1 Company Names

In the survey, a question was asked regarding the company name, which was optional. Out of the 109 companies that participated in the basic survey, only 54 representatives answered this question, representing approximately 49.5% of the total. These companies span various economic sectors and provided valuable information for analyzing the level of awareness and activity in sustainability and ESG.

1.2 Company industries

The companies that took part in the survey represent a wide range of economic sectors. The largest number of participants are in the mining industry (14%) and financial services (18.3%). The remaining sectors are distributed as follows as shown in Figure 1.

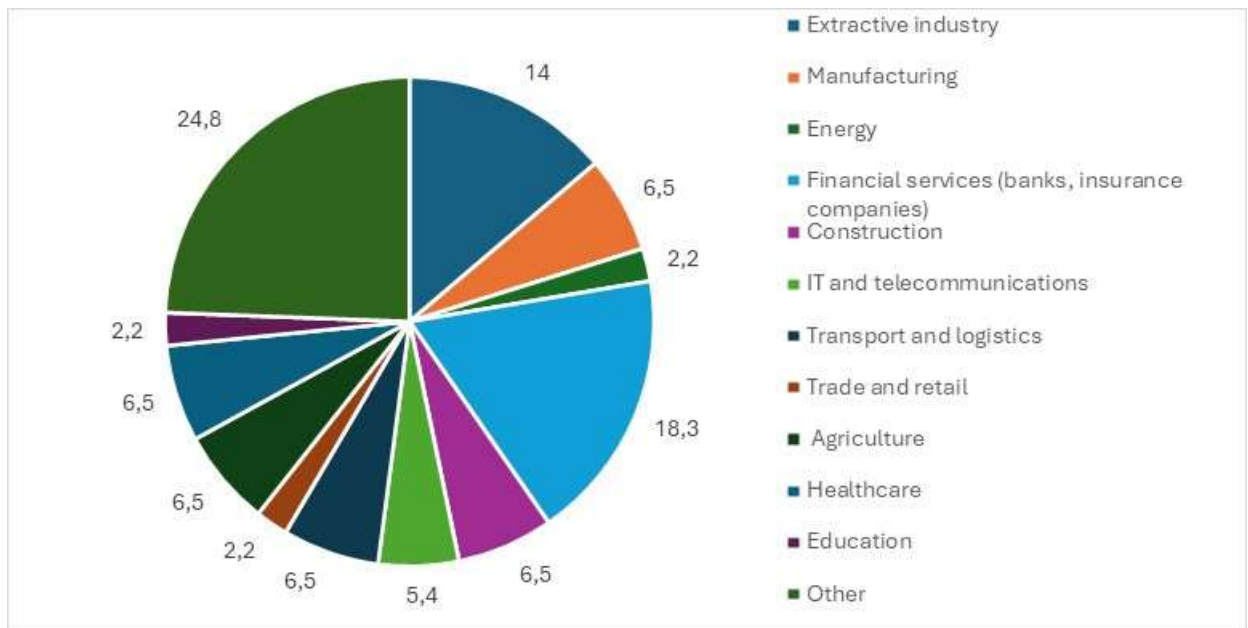


Figure 1. Answers to the question: Company industry. Data in %

These data demonstrate the diversity of the survey participants and reflect the broad interest in the topic of sustainable development across different industry sectors.

1.3 Business Entity

The size of the companies participating in the survey also varied. The large share of medium-sized (31.2%) and large businesses (38.7%) in the survey indicates the significant interest of these companies in issues of sustainable development and ESG strategies.

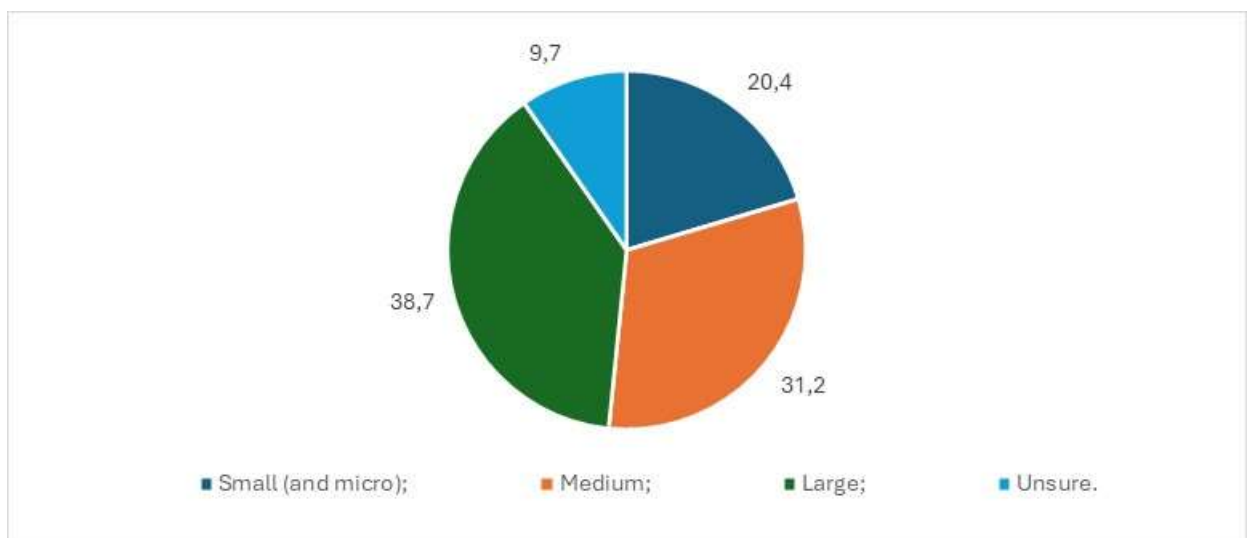


Figure 2. Answers to the question: Which business entity does your company belong to? Data in %

1.4 Number of employees

Companies with varying numbers of employees took part in the survey.

These data indicate that both small companies (25.7%) and large enterprises (74.3% in total) took part in the survey, which allows us to gain a more complete understanding of approaches to sustainable development at different business sizes.

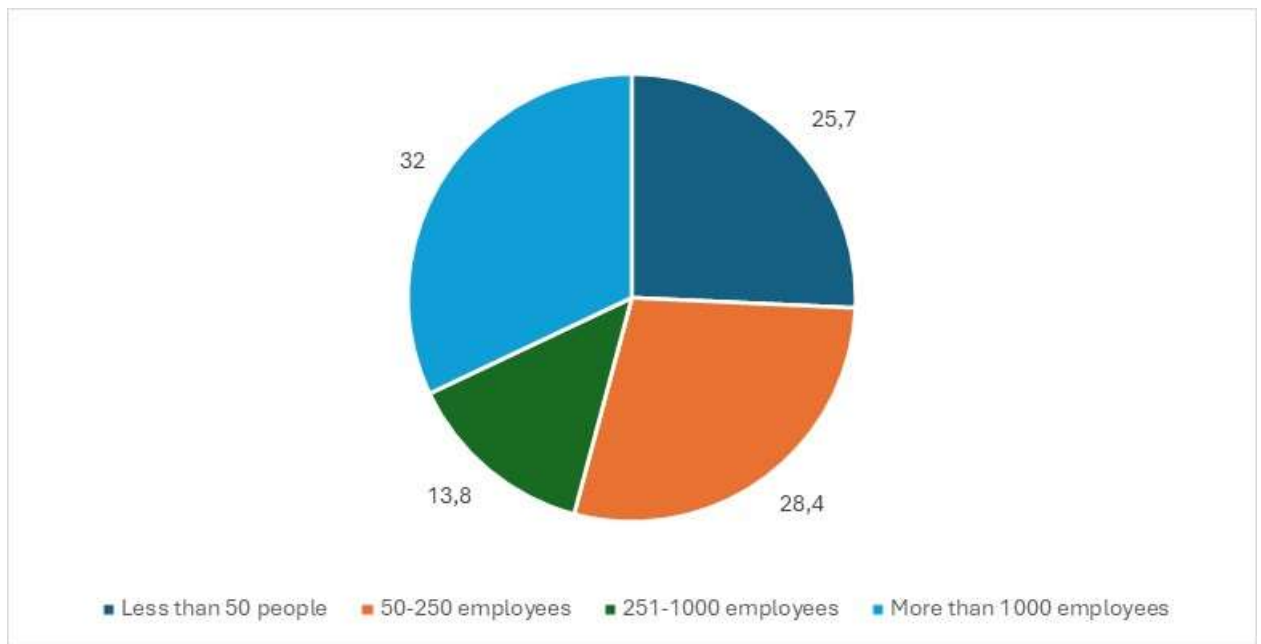


Figure 3. Answer to the question: Number of employees working in the company? Data in %

1.5 Duration of the company's activity

The period of activity of the companies participating in the survey was distributed as follows:

- Less than a year: 1.1%.
- 1-5 years: 14%.
- 6-10 years: 18.3%.
- More than 10 years: 67.7%.

Most companies have been operating for more than 10 years, which may indicate the maturity and sustainability of the business, as well as experience and accumulated knowledge in the field of sustainable development.

1.6 Respondent's position in the company

Survey respondents hold various positions in their companies:

- Company director: 22.6%.
- People/HR Manager/Representative: 9.69%.
- Head/representative of the service responsible for business development, strategy and planning: 15.1%.
- Head/representative of the service responsible for project activities: 4.3%.
- Head/Sustainability Representative: 6.5%.
- Other: 42%.

A large percentage of managers and representatives of strategic services indicate the importance of the topic of sustainable development for business management and planning.

1.7 In which region (region or city) does your company primarily operate?

The survey asked about the region in which companies primarily operate. The answers were distributed as follows as shown in the Figure 4.

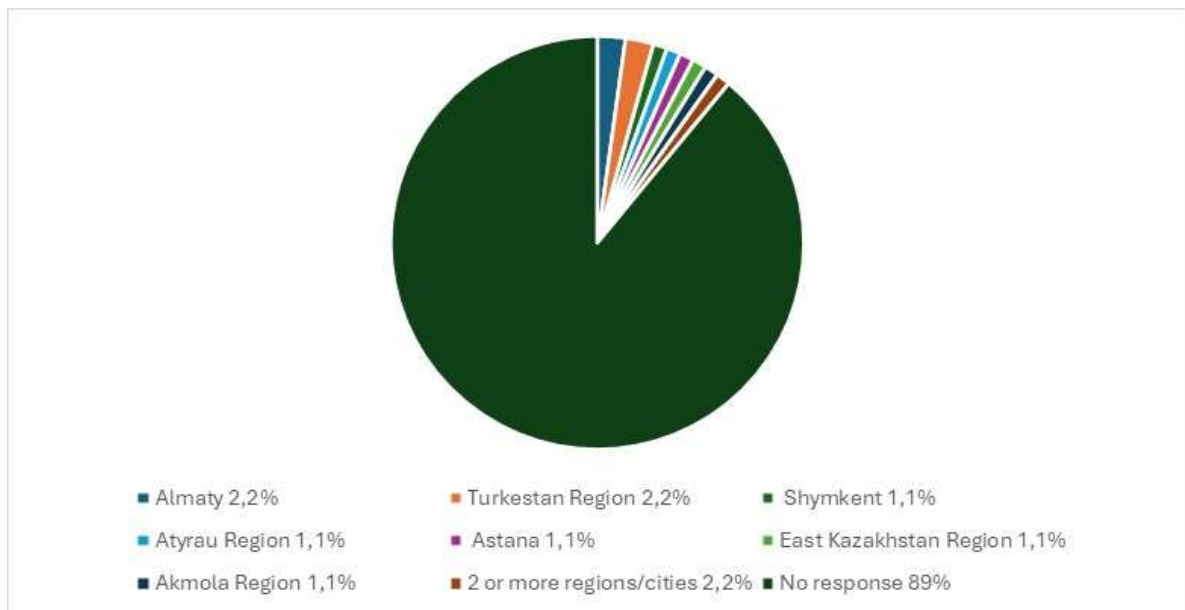


Figure 4. Answers to the question: In which region (region or city) does your company primarily operate?

These data show that most companies, about 89%, did not answer this question. However, the respondents who provided answers are concentrated in large cities and regions of Kazakhstan, such as Almaty, Turkestan region, Shymkent, Atyrau region, Astana, East Kazakhstan region and Akmola region. Some companies operate in multiple regions, reflecting their broader geographic presence.

Conclusion

The General Information section provides valuable data on the diversity of the study population, its size, number of employees, length of business, and respondents' positions. These data show widespread interest in the topic of sustainability and ESG across different economic sectors and company types. It is especially important to note that a significant part of the participants are large and medium-sized businesses, which emphasizes the strategic importance of sustainable development issues for mature and sustainable companies.

Section 2: Awareness of companies about the principles of sustainable development and ESG

The second section of the study aims to assess the level of awareness of companies about the principles of sustainable development and ESG. This section includes questions about the level of knowledge of employees, the presence of sustainable development strategies and the readiness of companies to integrate ESG principles into their activities.

2.1 How aware are companies of the principles of sustainable development and ESG?

Among respondents, the distribution of awareness levels is as follows as shown in the Figure 5.

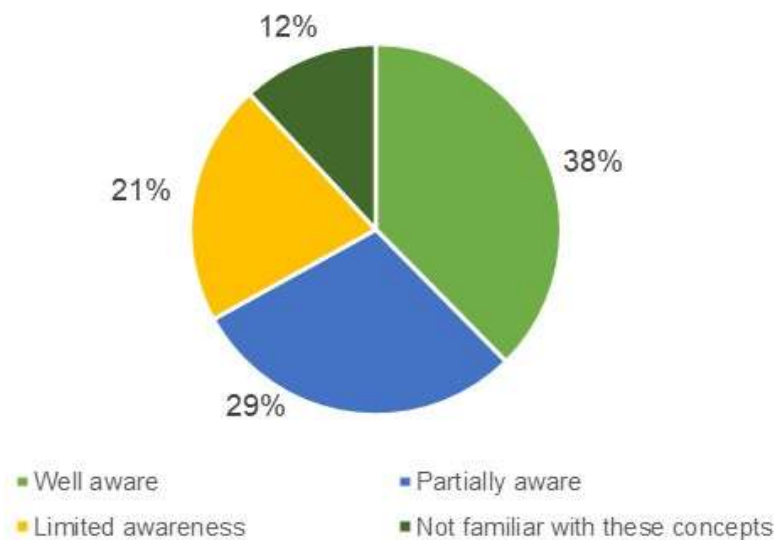


Figure 5. Answers to the question: How aware is the company of the principles of sustainable development (sustainable development of society and ecosystem without compromising the needs of future generations), the UN Sustainable Development Goals (SDGs) and ESG (environment, social responsibility and corporate governance).

More than 71% of companies demonstrated high or partial awareness of sustainability and ESG, demonstrating a growing understanding of the importance of these issues to business. This trend indicates an increase in awareness in this area, which is a positive signal for future initiatives and strategies.

2.2 Does the company have an approved sustainable development strategy (ESG strategy)?

The results on the presence of sustainable development strategies in companies are as follows:

- Yes, available: 37.6%.
- No, not available: 20.39%.
- Currently under development: 22.6%.
- Difficult to answer: 19.39%.

Almost 40% of companies already have approved sustainability strategies, and more than 20% are in the process of developing them. This shows that many companies recognize the importance of ESG and are taking steps to integrate them.

2.3 In what areas is your company taking practical steps?

Do companies note the following areas in which they are taking practical steps?

When answering this question, you could choose several answer options. Companies are actively taking measures to support social initiatives and ensure transparency of the company's activities. For example, 59 responses from company representatives support social initiatives at the company, region and country level, 55 responses ensure transparency and accountability of their activities. This demonstrates the business's commitment to meeting its social and environmental responsibilities.

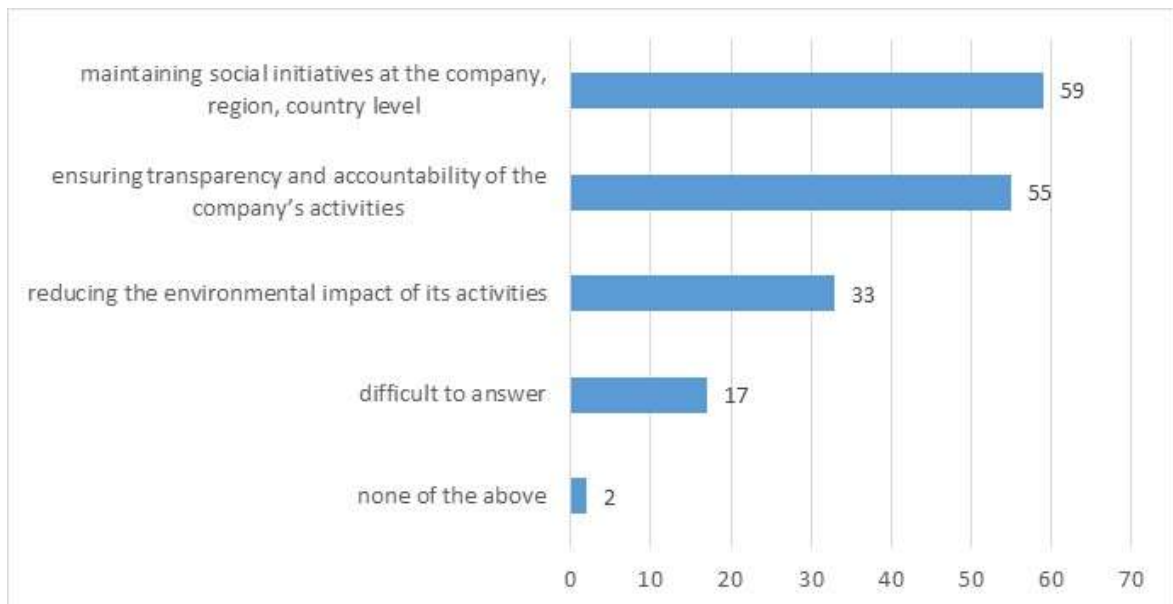


Figure 6. Answers to the question: In which of the listed areas has your company taken/is taking practical steps.

2.4 In what areas would your company like to improve its performance in the near future?

When answering this question, you could choose several answer options.

The companies plan to become more active and improve their performance in the following areas:

- Supporting social initiatives at the company, region, country level: 65 answers.
- Ensuring transparency and accountability of the company's activities: 42 answers.
- Reducing the environmental impact of your activities: 39 answers.

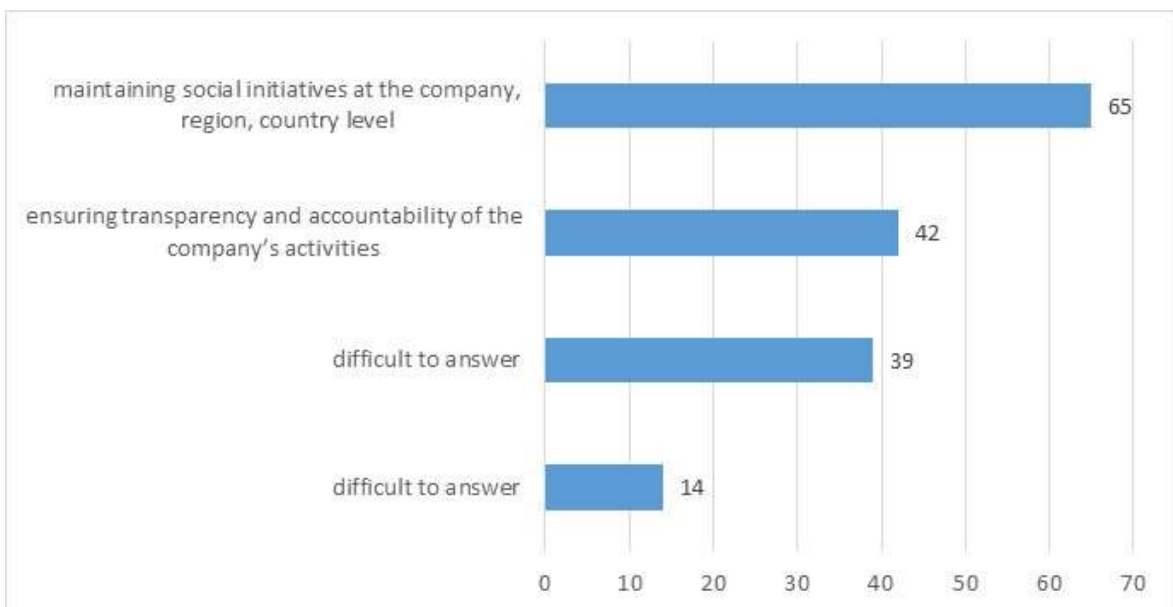


Figure 7. Answers to the question: In which of the listed areas would your company like to become more active and improve its performance in the near future?

It is also clear here that companies are focused on social initiatives and transparency of activities. Companies express a desire to improve their sustainability performance, as evidenced by their willingness to invest resources and effort into implementing sustainable practices.

2.5 Interest in participating in sustainable development projects

When asked about interest in participating in sustainable development projects, the answers were as follows:

- Yes: 71%.
- No: 4%.
- Difficult to answer: 24%.
- Possible, but not yet clearly understood: 1%.

More than 70% of companies are interested in participating in projects related to sustainable development, which demonstrates a high level of involvement and readiness to implement ESG principles.

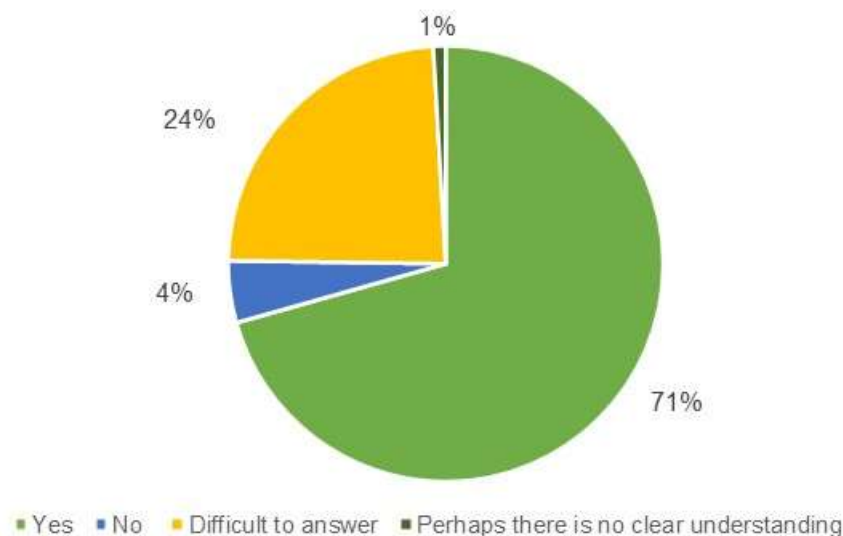


Figure 8. Answers to the question: Is the company interested in participating in and/or implementing projects related to sustainable development, and is the company considering the possibility of integrating the principles of sustainable development in its activities?

2.6 Perceptions of SDG and ESG advancement

Respondents view the promotion of SDGs and ESG on the agenda of business organizations as:

- Risks for the company: 3.2%.
- Opportunities for the company: 60.2%.
- Difficult to answer: 28%.
- I don't see any risks or opportunities in this: 8.6%.

More than 60% of companies view the promotion of SDGs and ESG as development opportunities, highlighting the strategic importance of these issues. At the same time, understanding the risks associated with their implementation helps companies manage their initiatives more effectively and mitigate potential threats.

Conclusion

The second section of the study shows that Kazakhstan companies are generally aware of the principles of sustainable development and ESG. Many companies already have sustainability strategies or are in the process of developing them. The main areas of activity are social initiatives and transparency of activities. Most companies are interested in participating in sustainable development projects and see this as an opportunity for their business.

Conclusion from a simple questionnaire:

The study found that Kazakh companies are aware of the importance of sustainable development and are actively working to integrate ESG principles into their activities. A significant number of companies are already taking concrete steps in this direction and are showing interest in further developing their sustainability strategies. These results indicate positive trends and open great prospects for future sustainability and ESG projects and initiatives in Kazakhstan.

2. In-depth questionnaire

The in-depth questionnaire included 4 general questions and 24 basic questions on sustainable development (see Appendix 2).

The in-depth survey was conducted on the Google.Forms platform.

The in-depth questionnaire was sent to company representatives who answered “Yes” to the following simple questionnaire question: “Is the company interested in participating in and/or implementing projects related to sustainable development, and is the company considering the possibility of integrating sustainable development principles into its activities” (see Figure 8).

Most participants in the simple questionnaire expressed interest in projects related to sustainable development and in integrating the principles of sustainable development in their activities. To this question, 77 of the 109 participants who took the simple questionnaire answered “Yes,” representing 71% of the total number of respondents. 26 company representatives (24% of the total number of respondents) found it difficult to answer, 5 participants answered no (4% of the total number of respondents), and one participant answered that participation is “possible, but there is no clear understanding yet”.

In summary, these results indicate that private companies have a strong interest in sustainability and a desire to incorporate sustainability principles into their operations, which is why these companies were selected to participate in an in-depth survey.

Profile of in-depth survey participants

An in-depth questionnaire was sent to 77 participants, of which 30 participants received a completed questionnaire (28 responses in Russian and 2 responses in Kazakh), which amounts to almost 39% of completed questionnaires, which confirms the interest of companies in participating in sustainable development projects.

About half of the surveyed companies (46%) belong to large businesses, 35% of the total number of respondents to the survey belong to medium-sized businesses and 19% to micro and small businesses. There is an interest in participation in sustainable development projects from businesses of different sizes; large businesses have the means and external drivers to study this issue more carefully, while medium and small businesses are also interested in sustainable development.

The distribution by business size among those who noted their size is presented in Figure 9. The full list of those who participated in the in-depth questionnaire is presented in Appendix 3.

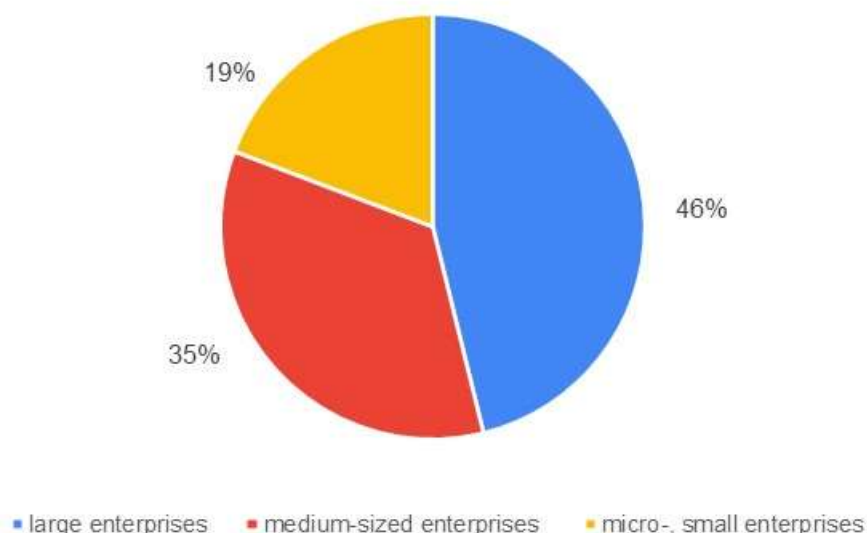


Figure 9. Distribution by business size among respondents

Among those who answered the in-depth question there are representatives of large companies such as Kazatomprom, Kazakhtelecom, NCOC, KazAzot, RG Brands, Jusan Bank, Forte Bank and MFO Swiss Capital, as well as representatives of small and medium-sized businesses.

By industry breakdown, respondents included companies from a wide range of industries (see Figure 10):

- Trade and retail sales (15% of the total number of respondents).
- Financial services (12%).
- Extractive industry, industrial production 11% each.
- Food and healthcare production at 8% each.
- Energy, IT and telecommunications, education 4% each.
- And other industries (mainly industrial and consulting services) – 23% of the total number of respondents.

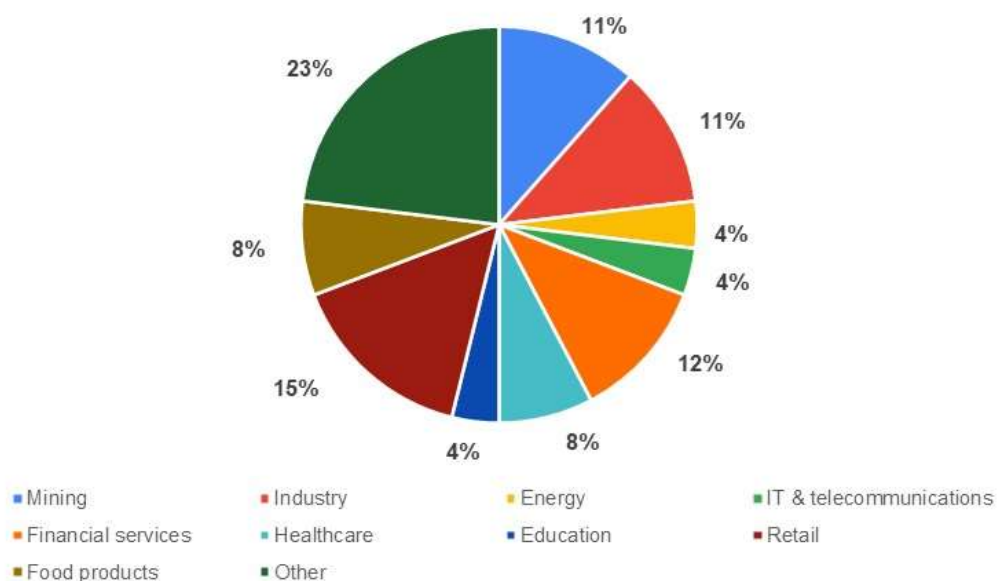


Figure 10. Distribution by industry among respondents

By region of presence of companies, the distribution among respondents was as follows (see Figure 11):

- Atyrau region (35%).
- Almaty (23%).
- Astana and Mangistau region 11% each.
- Turkestan and Kyzylorda regions 4% each.
- 12% of respondents work in several regions of presence.

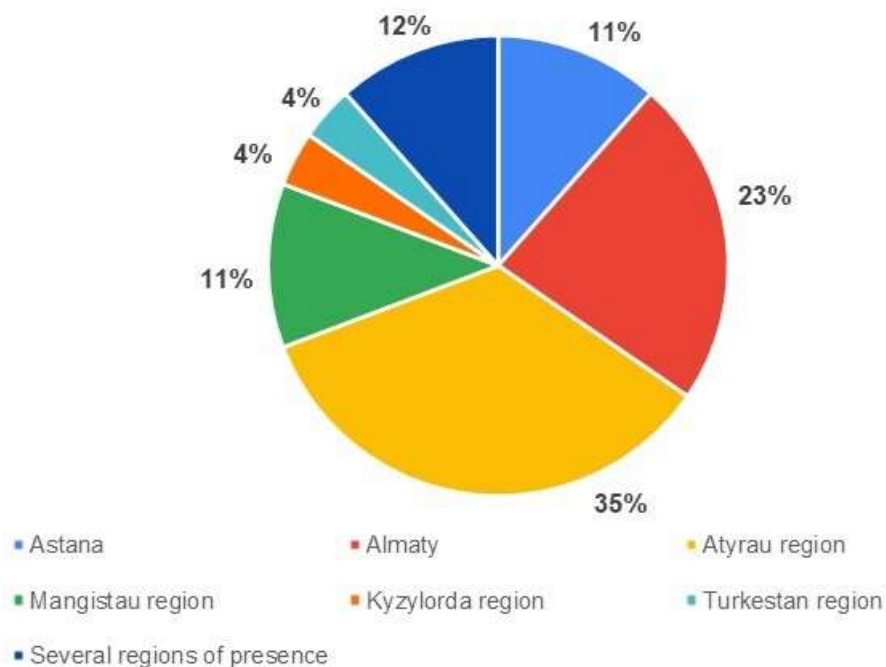


Figure 11. Distribution by region

In terms of answers that indicated several areas, the distribution is as follows.

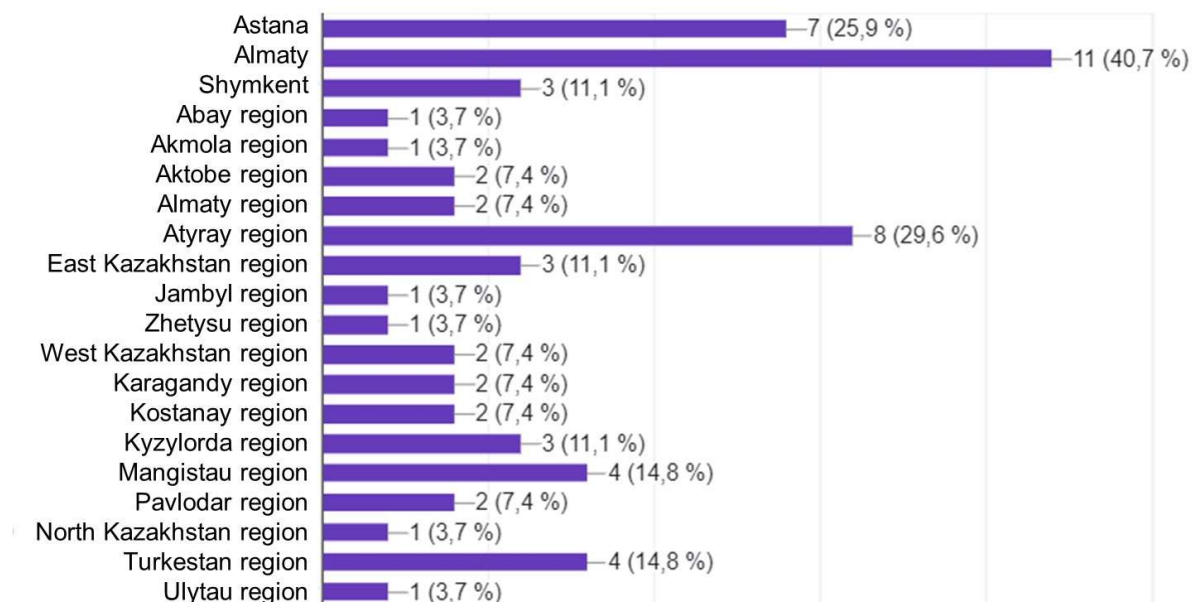


Figure 12. Number of responses among respondents by region of presence.

Basic questions of the in-depth questionnaire

The structure of the in-depth questionnaire included the following blocks of questions presented in Table 1.

Table 1. The structure of the in-depth questionnaire

Structure of the in-depth questionnaire	Number of questions
Understanding sustainable development and integrating issues into development strategy	11 questions
Interests and needs of the company in projects that are directly or indirectly related to sustainable development	4 questions
The company's readiness to cooperate with the academic sector on sustainable development issues	2 questions
Potential formats of cooperation with the academic sector	7 questions
Total basic questions	24 questions

Below are the results of answers for each block.

1. Understanding sustainable development and integrating issues into development strategy

As part of this block, an open-ended question was asked: "How does your company understand the concept of "sustainable development" and what key aspects do you consider the most important in this context?".

Very interesting answers were received to this question:

- Introduction of new innovative ideas on the path of development.
- Motivation, salary, stability.
- Conscious interdependence.
- Market flexibility, transformation, adaptability.
- Profitability, stability and relevant personnel growth, resources, environmental friendliness.
- Economy, Society and Ecology.
- Developed strategy for continuous improvement.
- Sustainable development is specific strategic plans and their achievement with a focus on stable financial and technological development.
- Ecological, Social and Governance.
- Balance between economic growth, social responsibility and environmental protection.
- A set of measures aimed at improving the economic, socio-demographic and environmental aspects of its activities. The company's sustainable development strategy is based on the following key aspects: Economic sustainability - ensuring long-term financial stability and growth, including the efficient use of resources and cost reduction. Social responsibility - creating favorable conditions for employees and society as a whole, improving the quality of life and ensuring human rights. Environmental protection - minimizing negative impacts on the environment, managing natural resources and reducing greenhouse gas emissions.
- Taking care of business and clients.
- Assisting the company in developing local communities and improving the environment of the region.
- Long-term contract.
- Volume growth, following market trends.
- Long-term development strategy.

- Social responsibility, environmental care, corporate governance.
- Social responsibility and environmental protection.
- Popularization of vitamins, healthy nation.
- Future generation, participation in the social process, and the process in the moment.
- Whatever we sow is what we reap.
- Daily challenges of humanity.
- Continuous improvement of performance results.
- Scaling the business, increasing sales, increasing the sales market.
- Actions aimed at protecting the environment, social responsibility and preserving mineral resources for the next generation.
- Sustainable development - development of improvements for the employee. We are constantly improving employee benefits, gym, tennis tables, free lunches and health insurance.
- Be better than your previous selves.

The most interesting answer was “Be better than your previous selves”.

Respondents noted the importance of sustainable development, which includes innovation, increased motivation and stability, and conscious interdependence. They emphasize the need for flexibility, transformation, and adaptation in the marketplace, as well as the balance between economic growth, social responsibility, and environmental protection. Many companies see sustainable development as a long-term strategy aimed at improving the economic, social and environmental aspects of their operations, with an emphasis on talent development and improving conditions for employees.

Thus, companies are ready to change and use the best solutions to implement their strategies and plans.

When asked “Which of the following aspects of sustainability are most important to your company?” Respondents were asked to tick several options:

- Reducing negative impact on the environment.
- Energy efficiency and use of renewable energy sources.
- Water consumption.
- Waste management.
- Adaptation to climate change.
- Social responsibility.
- Human rights.
- Support of the local population.
- Transparency of corporate governance.

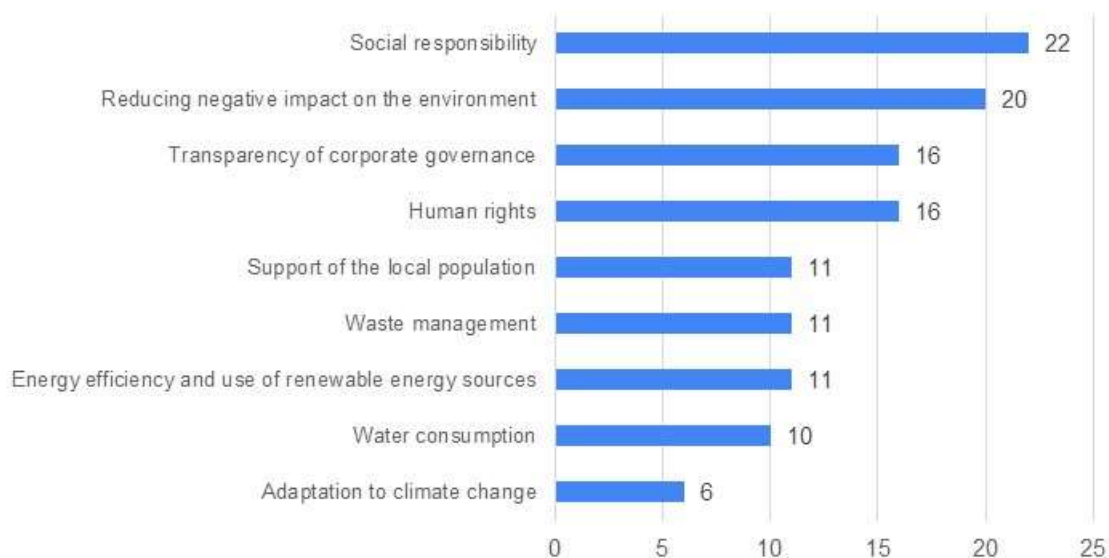


Figure 13. The answer to the question “Which of the following aspects of sustainability is most important to your company?”

Among those who responded, the most important aspects for companies are (see Figure 13):

- Social responsibility (22 answers).
- Reducing the negative impact on the environment (20 answers).
- Transparency of corporate governance and human rights issues (16 answers each).

It can be assumed that it is in these aspects that companies will be more ready to implement joint projects.

It is interesting that the aspect of adaptation to climate change was noted by only 6 respondents.

As part of the recommendations, it is worth paying special attention when distributing information and training materials to the importance of highlighting issues of adaptation to climate change, water consumption, waste management and energy efficiency.

To determine the degree of integration of sustainable development issues into the company's development strategy, a few questions were asked regarding the availability of an approved development strategy and its timing. Integration of elements of sustainable development into the strategy, availability of qualitative and quantitative goals and connection of the company's goals with the SDGs.

According to the survey results, 67% of companies out of the total number of companies surveyed have a development strategy, 40% have a development strategy for a period of 3 to 5 years, 20% have a period of 5 to 7 years, and only 2 companies have a strategy approved for a period of more than 7 years. 23% of the total number of respondents – the strategy has not been approved (see Figure 14).

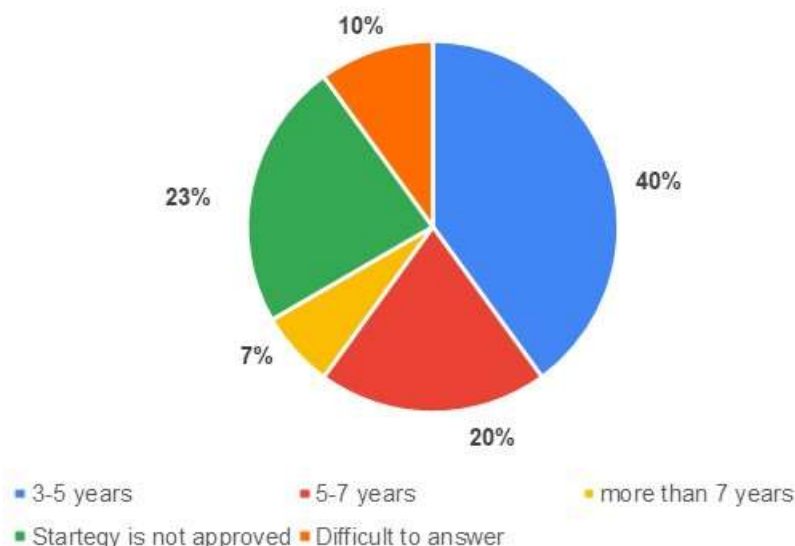


Figure 14. Approved development strategy among respondents

In terms of integrating individual elements of sustainable development into corporate strategy, respondents noted several options (see Figure 15).

The top answers were:

- Ethical business conduct and corporate governance (17 answers).
- Educational programs and employee awareness raising (15 responses).
- Waste management and recycling (14 answers). In this previous waste management, the question of the importance of aspects for the company was not a priority.
- Social responsibility, development of sustainable supply chains, innovation and improved technologies (13 answers each).

The element on sustainable consumption of water resources received the least number of responses (9 responses).

At the same time, considering the importance of this aspect for Kazakhstan, we consider it necessary to raise awareness among private sector companies on this indicator.

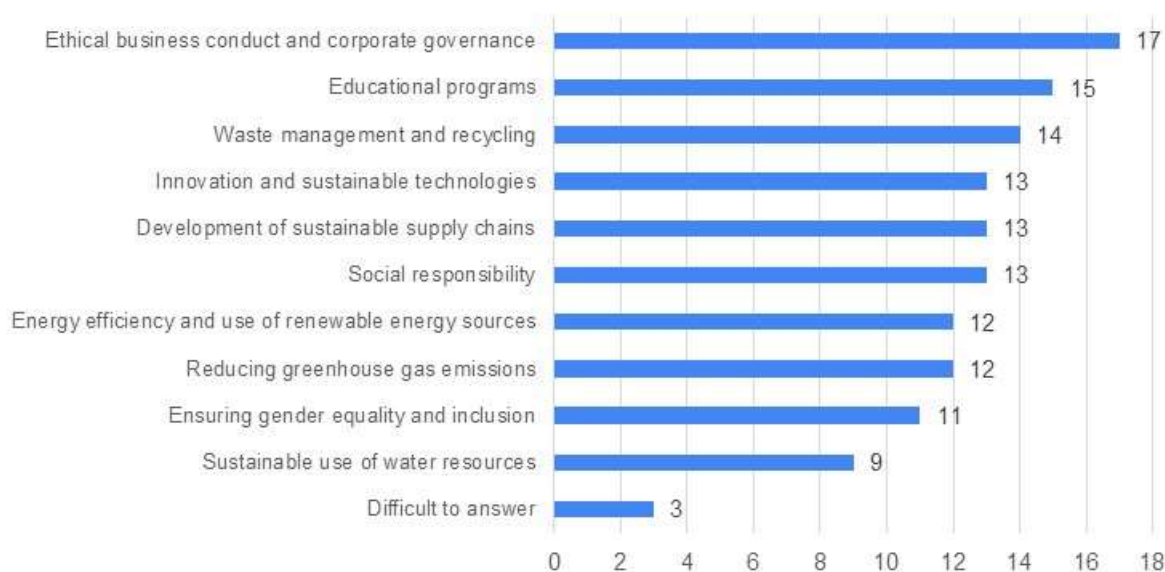


Figure 15. Integration of individual elements of sustainable development into the company's corporate strategy, answer to the question "What elements of sustainable development are integrated into your corporate strategy".

Most companies surveyed (60%) have established both qualitative and quantitative goals in the field of sustainable development, with another 7% having either qualitative or quantitative goals (see Figure 16). These indicators correlate with data on the presence of an approved development strategy (67% of the total number of respondents).

Data on the presence of qualitative and quantitative goals shows that companies have identified specific goals in the field of sustainable development, accordingly, it will be easier for them to evaluate progress towards achieving these goals.

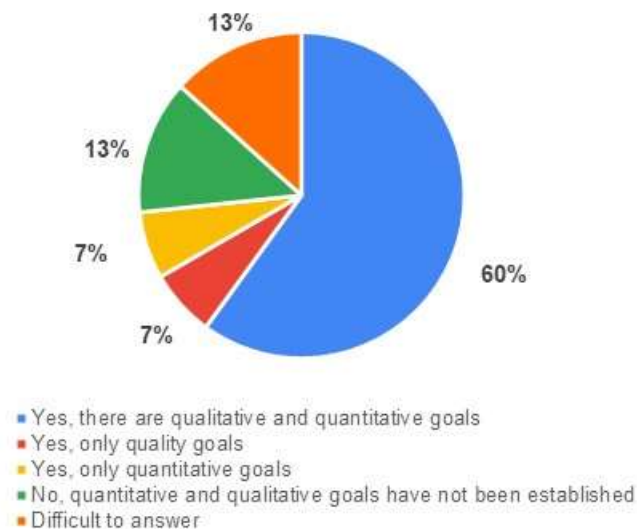


Figure 16. Integration of individual elements of sustainable strategy into the company's corporate strategy, answering the question "Does your company have qualitative and quantitative goals in the field of sustainable development?".

Despite having a development strategy and sustainable development goals, only a third of companies have established a link to specific SDGs. The majority (70% of the total) are just beginning their journey of integrating strategic goals with the SDGs (see Figure 17).

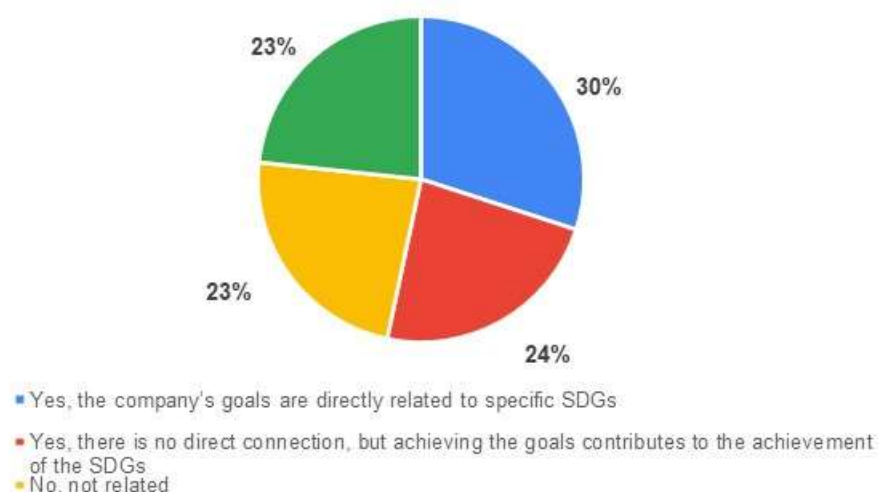


Figure 17. Connection of the company's goals with the SDGs, the answer to the question "Are your company's goals related to the UN Sustainable Development Goals (SDGs)?".

As part of the in-depth survey, respondents were asked about internal and external factors that influence the integration of sustainable development into their company's strategy; several options could be noted (see Figure 18).

The most important among the answers were: the company's corporate culture, the attitude of external key stakeholders to the concept of sustainable development.

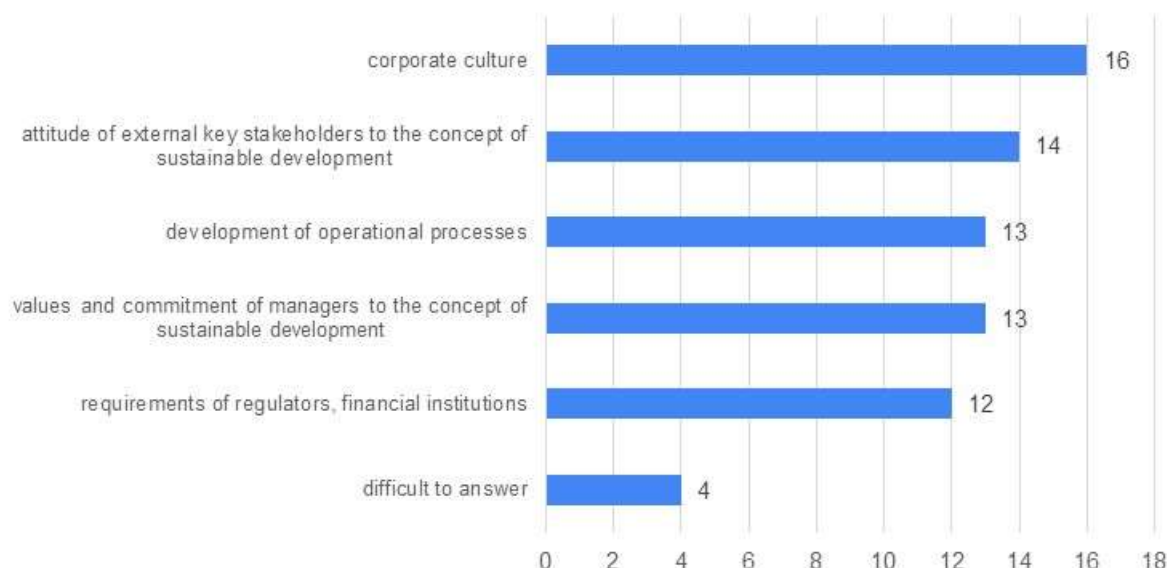


Figure 18. Internal and external factors influencing the integration of sustainable development into strategy, the answer to the question “What internal and external factors influence the integration of sustainable development into your company's strategy?”.

Among the answers to the question “What specific steps is your company taking to achieve sustainable development and implement the SDGs?”, the largest number of reports were received on the following steps:

- employee training in the field of sustainable development, SDGs, ESG - 18 answers.
- development of development cooperation with stakeholders (investors, international organizations, activists and NGOs, government and regulatory organizations, etc.) – 14 answers.

As we can see, companies at the beginning of their journey and integration of sustainability are focusing more on employee training, for greater coverage and understanding of sustainability within the company to promote better integration and are also taking steps to collaborate with stakeholders.

Respondents to the question “What opportunities does integrating sustainable development into strategy bring or can bring to your company?” noted the following (several answer options could be selected):

- strengthening the company's reputation (25 answers).
- optimization of business processes (19 answers).
- cost reduction (14 answers).
- attracting new clients (13 answers).

Overall, respondents have a good understanding of the opportunities that arise from integrating sustainability principles into a company's strategy.

To the question “What challenges does a company face in integrating sustainable development into strategy and business processes?” The following responses were received:

- lack of competence in the field of sustainable development, SDGs within the company (15 answers).
- absence/inadequacy of forces in the external environment that support such integration (14 answers).
- lack or underdevelopment of the necessary infrastructure (consulting on sustainable development, information support, etc.) – 7 answers.

Respondents added the following difficulties: lack of understanding on the part of employees and company management and lack of funding.

When asked “What is needed to improve the integration of sustainable development principles into strategy and business processes?”, respondents answered:

- financial resources for investing in innovation and technology (19 answers).
- financial resources for employee training (16 answers).
- consulting and management resources for integrating sustainability principles into business strategy (16 responses).
- infrastructure to enhance collaboration with stakeholders (10 responses).

As part of the responses received, it is important for the academic sector to explore the possibility of cooperation with companies, offering affordable services, in particular employee training, consulting services.

2. Interests and needs of the companies in projects that are directly or indirectly related to sustainable development

As part of the work, questions were asked to identify the interests and needs of the company in projects that are directly or indirectly related to sustainable development.

11 companies (37% of the total number of respondents) have a register of projects that are directly or indirectly related to sustainable development, achieving the SDGs and ESG principles. 6 companies (20%) have a project register, but they are not related to achieving SDGs and ESG. 9 companies responded (a third of those surveyed) that there is no such register and 4 found it difficult to answer (see Figure 19).

These data correlate with responses regarding the connection between company goals and SDGs (see Figure 17).

Thus, about 30% of companies are more conscious and advanced in integrating sustainable development into the company's strategy and processes.

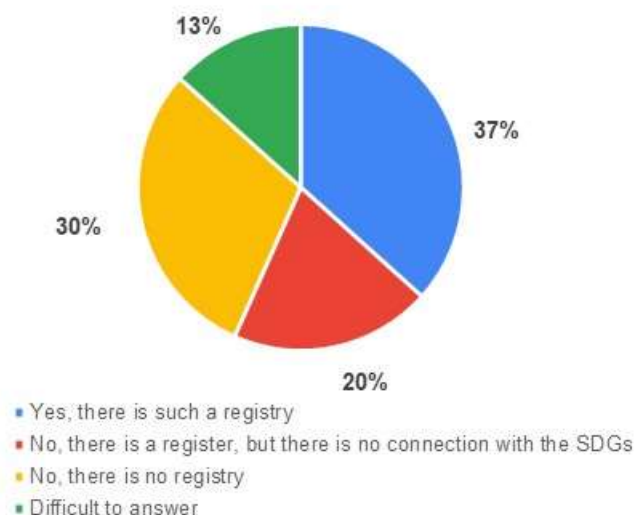


Figure 19. Availability of a register of projects that are directly or indirectly related to sustainable development, achievement of the Sustainable Development Goals (SDGs), ESG principles.

Among the projects related to sustainable development in which companies are interested, respondents highlighted the following (see Figure 20):

- optimization of production processes (19 answers).
- improving environmental efficiency (17 answers).
- social projects and initiatives (15 answers).

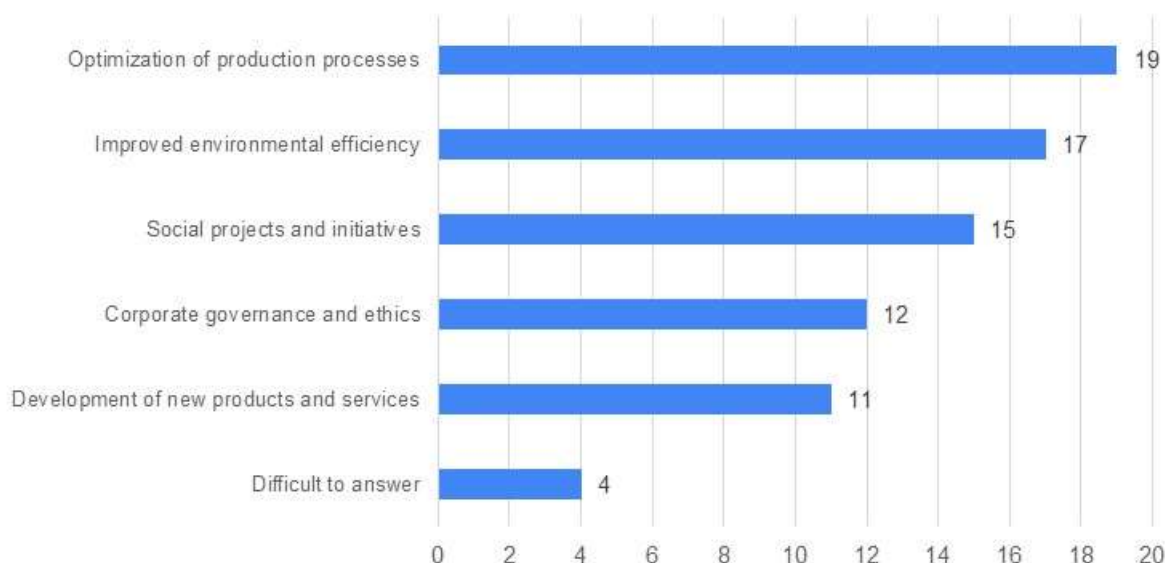


Figure 20. Companies' needs for projects related to sustainable development.

Among the problems that companies face when implementing sustainable development projects, respondents indicated the following:

- Lack of necessary knowledge and skills and lack of information and data (15 answers each).
- Lack of external support (14 answers).
- Lack of funding (13 answers).
- Regulatory barriers (10 answers).

As we can see, the main problems are the lack of necessary knowledge and skills, as well as a lack of information and data. In this regard, the SDG Space platform and active work with the academic sector can help in solving problems in these areas.

The main topics in the field of sustainable development on which companies are willing to cooperate with the academic sector are (see Figure 21):

- Technological developments (17 answers).
- Educational programs (16 answers).
- Ecological innovations (15 answers).

Interestingly, climate change adaptation topics again received the least number of responses (9 responses).

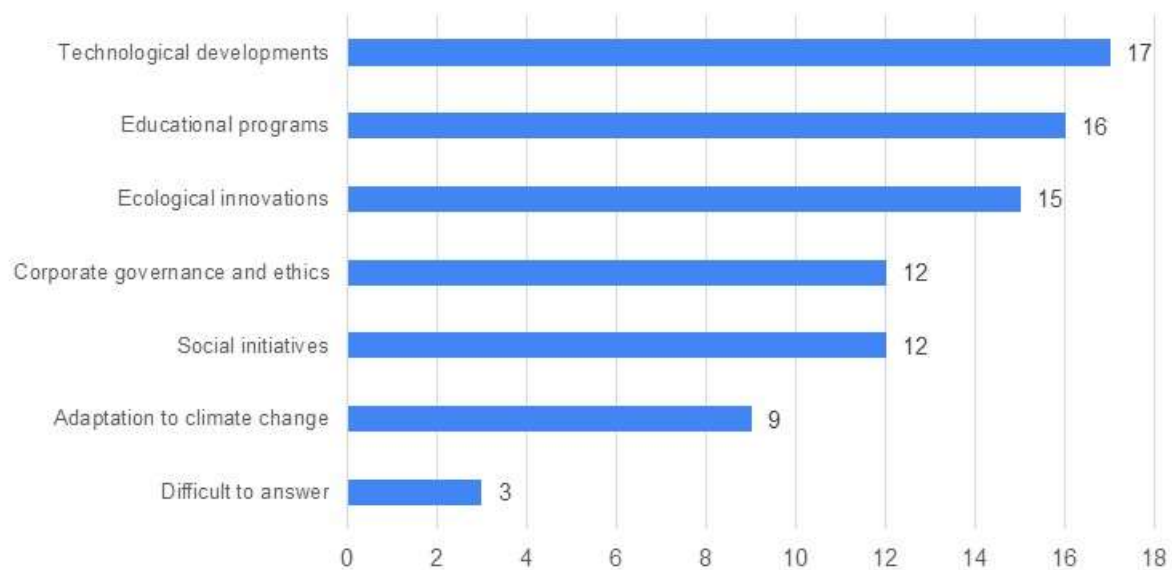


Figure 21. Topics in the field of sustainable development that are most interesting to companies for joint projects with the academic sector.

3. The company's readiness to cooperate with the academic sector on sustainable development issues

As part of this block, we wanted to find out from the respondents whether they are already collaborating with the academic sectors and whether they are ready to cooperate on issues of sustainable development.

Only 3 out of 30 respondents answered that they are not currently collaborating with the academic sector. 27 respondents identified forms of cooperation:

- educational programs and courses for company employees (16 answers).
- organizing internships and internships for students and future employees (10 answers).
- joint research projects (6 answers), for example, research in the field of cryogenics and energy.
- conducting seminars by company employees for students (8 answers).
- consulting services for the company (9 answers).

Among the companies surveyed, more than half (53%) are interested in cooperation with the academic sector on issues of sustainable development, achieving the SDGs, and implementing ESG principles. 10 companies (33%) found it difficult to answer (see Figure 22). At the same time,

they are also potential candidates for working together if appropriate forms of communication are available and the importance of addressing issues, as companies have a need to integrate sustainability issues into strategy.

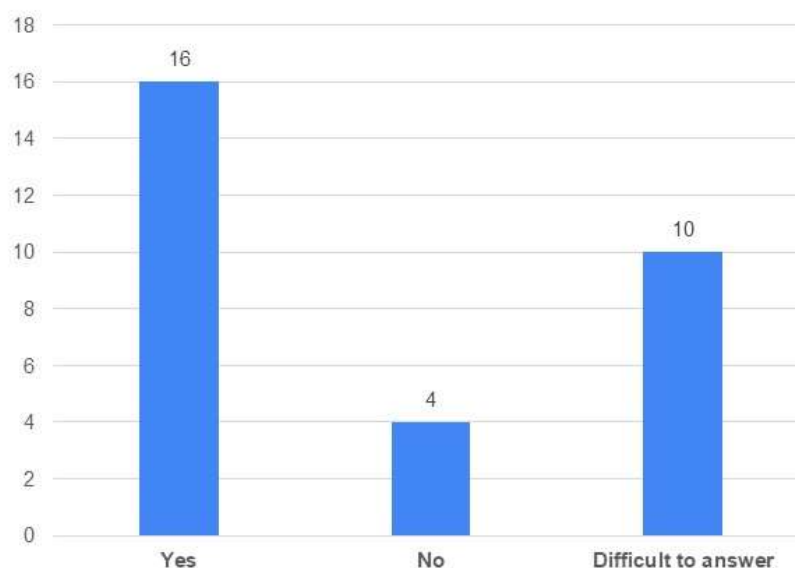


Figure 22. Interest in collaborating with the academic sector on sustainable development issues.

4. Potential formats of cooperation with the academic sector

Within the framework of this block, the possibility of potential formats of cooperation with the academic sector was explored.

Among the benefits that cooperation with the academic sector in the field of sustainable development can bring, respondents noted:

- Improvement of employee qualifications (24 responses).
- Access to advanced research and technology (18 responses).
- Improving the company's image (15 responses).
- Increasing innovative potential (13 responses).

For companies, the most acceptable forms of cooperation with the academic sector are consultations and expertise, joint educational programs and joint seminars and conferences (see Table 2).

Table 2. Forms of cooperation with the academic sector

Forms of cooperation with the academic sector	Number of responses
Consultations and expertise	18
Joint educational programs	15
Conducting joint seminars and conferences	15
Creation of joint products and/or development of technologies	13
Internships and practices for students	11
Joint research projects	7
Difficult to answer	5

Respondents noted the most significant barriers to cooperation with the academic sector, including:

- Lack of time and resources (19 responses).
- Differences in priorities and goals (8 responses).
- Difficulties in communications (7 responses).

At the same time, there are only 2 answers where “lack of trust” was chosen as a barrier, which generally speaks of the existing trust in the academic sector among Kazakhstani companies. Additionally, the following barriers were noted: lack of understanding, practical application of solutions proposed from the academic sector, difficulty in implementing such projects.

Based on the identified barriers to cooperation with the academic sector, it is timely to create an online platform that will contain information about projects in the academic sector, providing companies with the opportunity to easily familiarize themselves with them and select projects for joint participation.

Possible functions of this platform:

1. **Project Catalog:** A list of current and future research projects with a description of their goals, expected results and possible business benefits.
2. **Filters and search:** Convenient tools for searching and filtering projects by industry, topic, compliance with SDGs and stages of implementation.
3. **Communication tools:** Built-in tools for direct communication between representatives of the academic sector and companies to discuss possible cooperation (through the creation of a personal account, chat on the platform, etc.).
4. **Events Calendar:** Announcements of seminars, webinars and academic sector meetings where companies can learn more about new initiatives and discuss partnership opportunities.
5. **Resource Center:** Access to training materials, research and guidance that can help businesses better understand academic projects and their potential.

The SDG Space platform will help facilitate communication, synchronize priorities and goals, and save time and resources for both parties, promoting more fruitful and mutually beneficial cooperation.

To the question “Is your company ready to invest in joint projects with the academic sector?”, most respondents (63% of the total) answered perhaps if there are specific proposals.

Overall, 83% of respondents are willing to invest heavily and moderately, as well as consider investing (see Figure 23), which indicates a high level of interest among companies in working with the academic sector.

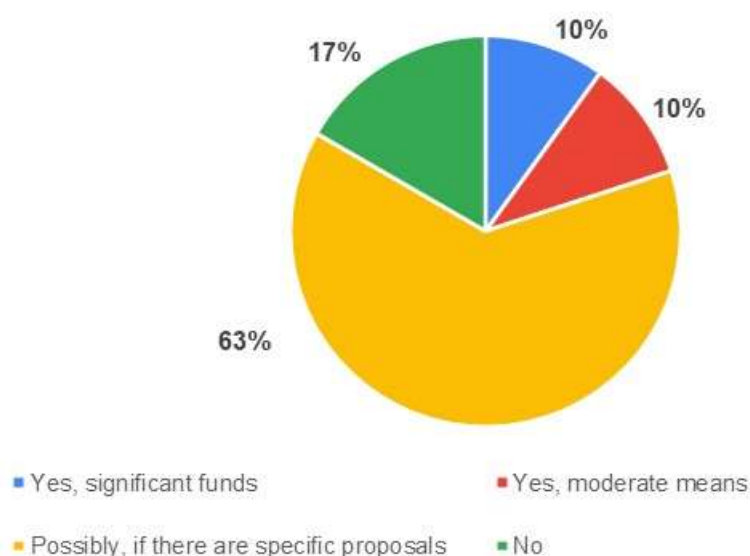


Figure 23. Willingness to invest in joint projects with the academic sector.

The survey asked an open-ended question asking people to describe a current problem that, when solved, would help the company improve its sustainability.

The following responses were received to this question:

- more complete integration of analytical tools into operational processes.
- lack of contracts and volumes.
- little experience, increasing expertise, improving the qualifications of employees, mass informatization of the company, trainings are necessary.
- optimization of operational activities, as this will reduce the time and resources spent by the company. Optimization of business processes, production automation.
- involvement of state institutions in scientific developments. Lack of industry innovation and lack of support from the government program.
- reduction of greenhouse gas emissions.
- state support for environmental initiatives. Subsidizing the company's processing of metallurgical waste. Combustion of solid waste.
- training and support from government agencies, institutes and scientific and industrial enterprises.
- reluctance of management to learn and train the team. As well as authoritarian management.
- rational use of resources.
- state interest, at the ministerial level, in the company's projects.
- methodological basis.
- improvement of innovations and technologies.
- attracting investments (bonds, loans).
- improving business culture.

One of the respondents gave a very detailed answer to this question: "One of the current problems is the high wear and tear of production facilities and the associated significant production costs. This limits the company's efficiency and competitiveness, creating risks for sustainable development. To solve this problem, it is necessary to invest in the modernization and renewal of equipment, the introduction of advanced technologies and the optimization of production processes. These measures will not only reduce operating costs and increase productivity, but also reduce environmental impact through more efficient use of resources and reduced emissions. Thus, modernization of production will be a key step towards increasing the sustainability of the company's operations and its long-term development."

Thus, respondents indicated that to increase the sustainability of the company, it is necessary to improve the integration of analytical tools, increase the number of contracts, improve the skills of employees, optimize operations, involve government institutions in scientific development, reduce greenhouse gas emissions, and attract investment.

Possible Recommendations for Companies and the Academic Sector:

1. *Integration of Analytical Tools:* Implement modern analytical solutions to optimize operational processes. The SDG Space platform can be particularly helpful in this regard.
2. *Training and Skill Development:* Develop a training plan and organize regular training sessions and professional development programs for employees, with the involvement of the academic sector.
3. *Optimization and Automation:* Conduct an audit of business processes and implement automation to enhance efficiency, possibly with consultants from the academic sector.
4. *Government Support:* Establish collaboration with government institutions to gain support and subsidies for environmental and sustainability initiatives, in partnership with the academic sector.

5. *Investments and Innovations*: Develop strategies to attract investments and implement innovative technologies in collaboration with the academic sector and international institutions.

More than 76% of respondents (23 responses) would like to receive the results of an in-depth survey, and 70% (21 responses) would like to receive expert support on finding sustainable solutions in the Republic of Kazakhstan.

Conclusion on the in-depth questionnaire:

The study showed that Kazakh companies are taking concrete steps to integrate sustainable development into the company's strategy and processes, are interested in working together with the academic sector, and are identifying the main areas for working with the academic sector.

Result and conclusion of the survey

Key findings from the conducted study:

1. The conducted survey (both basic and in-depth) showed a high level of company interest in participating: 109 companies responded to the basic survey out of 480 invitations (22.7%), and 30 companies responded to the in-depth survey out of 77 invitations (39%). This demonstrates not only the companies' interest in sustainability but also their trust in AlmaU.
2. The survey included large, medium, and small companies from various industries and regions. Participants varied in size, number of employees, duration of operations, industry specifics, location, and respondent positions, indicating a broad interest in the research topic.
3. Companies are **generally aware of sustainability issues**, the SDGs, and ESG principles.
4. The **most important aspects of sustainability** for companies are social responsibility, reducing negative environmental impact, corporate governance transparency, and human rights, aligning with the broader understanding of sustainability and ESG.
5. Most companies (67%) **have a development strategy** for three or more years, and 60% have set sustainability goals. However, only a third have linked these goals to specific SDGs.
6. The most significant **factors influencing the integration of sustainability** into company strategy are corporate culture and the attitudes of external key stakeholders towards sustainability.
7. Companies at the beginning of their sustainability journey **prioritize employee training** to increase understanding and integration of sustainability within the company and are taking steps to collaborate with stakeholders.
8. Over 80% of respondents have experience with sustainability-related projects. Common areas of experience include "supporting social initiatives at the company, regional, and national levels" (54% of respondents) and "ensuring transparency in company activity reporting" (49% of respondents). Only 30% selected "reducing the environmental impact of their activities."
9. Companies are **interested in future projects** related to optimizing production processes, improving environmental efficiency, and social projects.
10. The **main challenges** in implementing sustainability projects are a lack of necessary knowledge and skills and a shortage of information and data.
11. More than half of the **companies are interested in collaborating** with the academic sector on sustainability issues, achieving SDGs, and implementing ESG principles.
12. Companies are **willing to collaborate with the academic sector** on technological developments, educational programs, and environmental innovations.
13. The most **acceptable forms** of collaboration with the academic sector for companies are consultations and expertise, joint educational programs, and conducting joint seminars and conferences.

14. Overall, 83% of respondents **are willing to invest** significant or moderate funds and consider investment opportunities, indicating a high level of company interest in working with the academic sector.

Recommendations for companies and the academic sector based on the results of the study.

The SDG Space platform can facilitate communication, synchronize priorities and goals, and save time and resources for both parties, promoting more productive and mutually beneficial collaboration:

1. **Integration of Analytical Tools:** Implement modern analytical solutions to optimize operational processes.
2. **Training and Skill Development:** Develop a training plan and organize regular training sessions and professional development programs for employees with the involvement of the academic sector. SDG Space and active engagement with the academic sector can address issues identified by companies, such as lack of necessary knowledge and skills and insufficient information and data.
3. **Optimization and Automation:** Conduct a business process audit and implement automation to enhance efficiency, potentially with the help of academic sector consultants.
4. **Government Support:** Collaborate with the academic sector to establish partnerships with government institutions for support and subsidies for environmental and sustainability initiatives.
5. **Investments and Innovations:** Develop strategies for attracting investments and implementing innovative technologies in collaboration with the academic sector and international institutions.

Additionally, it is important to emphasize the significance of addressing issues related to climate change adaptation, water consumption, waste management, and energy efficiency when disseminating information and educational materials from the academic sector. This will enhance their relevance and increase interest from companies.

Possible Features of the SDG Space Platform:

1. **Project Catalog:** A list of current and upcoming research projects with descriptions of their goals, expected outcomes, and potential benefits for businesses.
2. **Search and Filtering Tools:** Convenient tools for searching and filtering projects by industry, topic, SDG alignment, and project stage, enabling companies to easily review available projects and select those for collaboration.
3. **Communication Tools:** Built-in features for direct communication between academic sector representatives and companies to discuss potential collaborations, such as personal account creation, platform chat, etc.
4. **Event Calendar:** Announcements of seminars, webinars, and meetings organized by the academic sector where companies can learn about new initiatives and discuss partnership opportunities.
5. **Resource Center:** Access to educational materials, research, and guides that can help businesses better understand academic projects and their potential.

Sources of information used

- 1) Results of a simple questionnaire in Russian
<https://docs.google.com/forms/d/1JerN3gu3u50ZroMMFGL5olRmfCDAQYhaTEDyRB1eYsE/edit?ts=665db073#responses> ,
<https://docs.google.com/forms/d/1XAf9CLLV9lnR7SV2QHigAPQPvYID25qsCrTGjOSuqtQ/edit?ts=6662c95f#responses>
- 2) Results of a simple questionnaire in Kazakh
https://docs.google.com/forms/d/1IDFL1PzuWBjmlzekOnZ6U95MIUfiMtlA_DMwiSZ5PvQ/edit?ts=665db08e#responses
- 3) Results of an in-depth questionnaire in Russian
<https://docs.google.com/forms/d/1kLAZLm8F-Kn1bGyhmxtY5UHINhgaZ9G0u050i3Ri4ic/edit?ts=666bfb5a#responses>
- 4) Results of an in-depth questionnaire in Kazakh
<https://docs.google.com/forms/d/1AsrbL8gP91DJlfB12s7F2ZDgU8eAay2wJgu6iFjKNMQ/edit?ts=666c16a3#responses>

Appendix 1. Simple questionnaire

Simple questionnaire (Google.Forms):

Dear Colleagues!

In light of the growing importance of sustainable development and the debate on how to develop modern society without compromising the needs of future generations and ecosystems, we invite you to take part in our survey.

The purpose of the survey is to explore the integration of the UN Sustainable Development Goals (SDGs) and ESG (environment, social responsibility and corporate governance) principles into your company's strategic planning and practices.

Your participation in the survey will help identify key sustainability trends and launch an effective platform for finding sustainable business solutions.

Thank you in advance for your participation and contribution to the study!

Required fields:

- 1) Please provide your company name (optional): _____.
- 2) Company industry (drop-down list)
 - Mining industry
 - Industrial production
 - Energy
 - Financial services (banks, insurance companies)
 - Construction
 - IT and telecommunications
 - Transport and logistics
 - Trade and retail sales
 - Agriculture
 - Healthcare
 - Education
 - Other - write
- 3) Which business entity does your company belong to (drop-down list):
 - small (and micro).
 - medium.
 - large.
 - difficult to answer.
- 4) Number of employees working in the company (drop-down list)
 - Less than 50 people
 - 50-250 employees
 - 251-1000 employees
 - More than 1000 employees
- 5) Duration of the company's activity (drop-down list):
 - Less than a year
 - 1-5 years
 - 6-10 years
 - More than 10 years
- 6) Your position in the company
 - Director of company
 - Head/representative of people services/HR

- Head/representative of the service responsible for business development, strategy and planning
- Head/representative of the service responsible for project activities
- Sustainability Manager/Representative
- other

7) In which region (region or city) does your company primarily operate?

- Astana
- Almaty
- Shymkent
- Abay region
- Akmola region
- Aktobe region
- Alma-Ata's region
- Atyrau region
- East Kazakhstan region
- Jambyl Region
- Zhetysu region
- West-Kazakhstan region
- Karaganda region
- Kostanay region
- Kyzylorda Region
- Mangistau region
- Pavlodar region
- North-Kazakhstan region
- Turkestan region
- Ulytau region
- Other

Main block of questions

1. How aware is the company of the principles of sustainable development (sustainable development of society and ecosystem without compromising the needs of future generations), the UN Sustainable Development Goals (SDGs) and ESG (environment, social responsibility and corporate governance): (select 1 answer)

- a. Well informed
- b. Partially aware
- c. Little knowledgeable
- d. Not familiar with these concepts

2. Does the company have an approved sustainable development strategy (ESG strategy, SDGs) or is sustainable development one of the priority areas of the company's strategy? (select 1 answer)

- a. Yes, available
- b. No, not available
- c. Currently being developed
- d. Difficult to answer

3. In which of the listed areas has your company taken/is taking practical steps? (you can select several)

- a. reducing the environmental impact of its activities
- b. maintaining social initiatives at the company, region, country level
- c. ensuring transparency and accountability of the company's activities
- d. none of the above.
- e. Difficult to answer

4. In which of the following areas would your company like to become more active and improve its performance in the near future? (you can select several)
- a. reducing the environmental impact of its activities
 - b. maintaining social initiatives at the company, region, country level
 - c. ensuring transparency and accountability of the company's activities
 - d. none of the above.
 - e. Difficult to answer
5. Is the company interested in participating in projects and/or implementing projects related to sustainable development, and is the company considering the possibility of integrating the principles of sustainable development in its activities (select 1 answer)
- a. Yes
 - b. No
 - c. Difficult to answer
 - d. Other
6. You consider promoting SDGs and ESG topics on the agenda of business organizations more like: (select 1 answer)
- a. risks for the company
 - b. opportunities for the company
 - c. Difficult to answer
 - d. I don't see any risks or opportunities in this.

Appendix 2. In-depth questionnaire

Section 1. General information (required)

1. Company name
2. Full name of the respondent
3. Contacts
4. In which region (region or city) does your company primarily operate?
 - Astana
 - Almaty
 - Shymkent
 - Abay region
 - Akmola region
 - Aktobe region
 - Alma-Ata's region
 - Atyrau region
 - East Kazakhstan region
 - Jambyl Region
 - Zhetysu region
 - West-Kazakhstan region
 - Karaganda region
 - Kostanay region
 - Kyzylorda Region
 - Mangistau region
 - Pavlodar region
 - North-Kazakhstan region
 - Turkestan region
 - Ulytau region
 - Other

Section 2. Understanding sustainable development and integrating issues into development strategy

1. How does your company understand the concept of “sustainable development” and what key aspects do you consider most important in this context? (write at least 3 words) (optional)

2. Which of the following aspects of sustainability are most important to your company? (check all that apply) (required)
 - Reducing negative impact on the environment
 - Energy efficiency and use of renewable energy sources
 - Water consumption
 - Waste management
 - Adaptation to climate change
 - Social responsibility
 - Human rights

- Support of the local population
- Transparency of corporate governance
- Other (specify)
- Difficult to answer

3. For what period is your company's sustainable development strategy approved (or until what year)? (choose one answer) (optional)

- 3-5 years
- 5-7 years
- more than 7 years
- the strategy has not been approved
- difficult to answer

4. What elements of sustainability are integrated into your corporate strategy? (check all that apply) (required)

- Reducing greenhouse gas emissions
- Energy efficiency and use of renewable energy sources
- Waste management and recycling
- Sustainable use of water resources
- Social responsibility and support of local communities
- Ensuring gender equality and inclusion
- Ethical business conduct and corporate governance
- Development of sustainable supply chains
- Innovation and sustainable technologies
- Educational programs and employee awareness raising
- Other (please specify)
- Difficult to answer

5. Does your company have qualitative and quantitative sustainability goals? (choose one answer) (required)

- Yes, there are qualitative and quantitative goals
- Yes, only quality goals
- Yes, only quantitative goals
- No, quantitative and qualitative goals have not been established
- Difficult to answer

6. Are your company's goals aligned with the United Nations Sustainable Development Goals (SDGs)? (choose one answer option) (required)

- Yes, the company's goals are directly related to specific SDGs
- Yes, there is no direct connection, but achieving the goals contributes to the achievement of the SDGs
- No, not related
- Difficult to answer

7. What internal and external factors influence the integration of sustainable development into your company's strategy? (check all that apply). (required)

- values and commitment of managers to the concept of sustainable development
- corporate culture of the company
- requirements of regulators, financial institutions
- development of operational processes
- attitude of external key stakeholders to the concept of sustainable development
- other (write)
- Difficult to answer

8. What specific steps is your company taking to achieve sustainable development and implement the SDGs? (check all that apply). (required)

- reuse of products, expansion and facilitation of repair capabilities, etc.
- employee training in the field of sustainable development, SDGs, ESG
- development of development cooperation with stakeholders (investors, international organizations, activists and NGOs, government and regulatory organizations, etc.)
- other (write): _____
- none of the above

9. What opportunities does, or could, bring to your company by integrating sustainability into its strategy? (check all that apply) (required)

- optimization of business processes
- cost reduction,
- attracting new clients
- strengthening the company's reputation
- other (write): _____
- Difficult to answer

10. What challenges does your company face in integrating sustainability into strategy and business processes? (check all that apply) (required)

- lack of competence in the field of sustainable development, SDGs within the company
- lack or underdevelopment of the necessary infrastructure (consulting on sustainable development, information support, etc.)
- absence/inadequacy of forces in the external environment that support such integration
- other (write): _____
- difficult to answer

11. What do you need to better integrate sustainability into your strategy and business processes? (check all that apply) (optional)

- financial resources for investing in innovation and technology
- financial resources for employee training
- advisory and management resources to integrate sustainability principles into business strategy
- infrastructure to enhance collaboration with stakeholders
- other (write): _____

Section 3. Interests and needs of the company in projects that are directly or indirectly related to sustainable development

12. Does the company have a register of projects that are directly or indirectly related to sustainable development, achieving the Sustainable Development Goals (SDGs), and ESG principles? (choose one answer) (optional)

- Yes, there is such a registry
- No, there is a register, but there is no connection with the SDGs
- No, there is no registry
- Difficult to answer

13. What needs does your company have for sustainability-related projects? (check all that apply) (required)

- Development of new products and services
- Optimization of production processes
- Improved environmental efficiency
- Social projects and initiatives
- Corporate governance and ethics
- Other (write):

– Difficult to answer

14. Which of the following challenges does your company face when implementing sustainability projects? (check all that apply) (optional)

- Lack of funding
- Lack of necessary knowledge and skills
- Lack of external support
- Regulatory barriers
- Lack of information and data
- Other (write):

15. What topics in the field of sustainable development are most interesting for your company for joint projects with the academic sector? (check all that apply) (required)

- Ecological innovations
- Adaptation to climate change
- Social initiatives
- Corporate governance and ethics
- Technological developments
- Educational programs
- Other (write):

– Difficult to answer

Section 4. The company's readiness to cooperate with the academic sector on sustainable development issues

16. Does your company collaborate with the academic sector? If so, what forms of cooperation are these, on what issues? (check all that apply) (optional)

- educational programs and courses for company employees
- organizing internships and practices for students and future employees
- joint research projects (if yes, indicate the direction)
- conducting seminars by company employees for students
- consulting services for the company
- other forms of cooperation (specify which ones)_____

17. Is your company interested in collaborating with the academic sector on issues of sustainable development, achieving the SDGs, and implementing ESG principles? (choose one answer option) (required)

- Yes
- No
- Difficult to answer

Section 5. Potential formats for cooperation with the academic sector

18. What benefits do you think collaboration with the academic sector can bring in the area of sustainable development? (check all that apply) (optional)

- Access to advanced research and technology
- Improvement of employee qualifications
- Improving the company's image
- Increasing innovative potential
- Other (write):_____

19. What forms of cooperation with the academic sector are most preferable for your company? (check all that apply) (required)

- Joint research projects
- Consultations and expertise
- Joint educational programs
- Internships and practices for students
- Conducting joint seminars and conferences
- Creation of joint products and/or development of technologies
- other (write):_____
- Difficult to answer

20. What barriers exist for your company when collaborating with the academic sector? (check all that apply) (required)

- Lack of time and resources
- Difficulties in communication

- Differences in priorities and goals
- Lack of trust
- Other (specify)
- Difficult to answer

21. Is your company ready to invest in joint projects with the academic sector? (choose one answer) (optional)

- Yes, significant funds
- Yes, moderate means
- Possibly, if there are specific proposals
- No

22. Describe a current problem, the solution of which will help your company improve the sustainability of its activities. One paragraph. (required)

23. Would you like to receive the survey results? (optional)

- Yes, my email address
- No

24. The project involves the work of an expert group to find sustainable solutions for companies operating in the Republic of Kazakhstan. Would you like to receive this kind of expert support? (optional)

- Yes, my email address
- No

Appendix 3. Names of companies that completed the in-depth survey

Наименование компаний, которые отметили в анкетах название компании.

- 1 ESS Support Services LLP
- 2 NCOC
- 3 Public Environmental Foundation "NATURE FIRST"
- 4 SanaMed
- 5 Synchron LLP
- 6 Schneider Electric
- 7RG BRANDS
- 8 Kazakhtelecom
- 9 NAC KAZATOMPROM JSC
- 10 TOO MFO Swiss Capital (Swiss Capital)
- 11 JSC KazAzot
- 12 Jusan Bank
- 13 Petro Kazakhstan Kumkol Resources
- 14 M.S.E.
- 15 AtyrauPromVentilation LLP
- 16 ATM Solutions
- 17 IP Kalybek
- 18 Fortebank branch in Atyrau
- 19 SBP KAZMUNAYGAS LLP DRILLING
- 20 Nutribase
- 21 Oncological dispensary (Atyrau)
- 22 Marine Team LLP
- 23 JSC Export Credit Agency of Kazakhstan
- 24 Satbayev University
- 25 Chamber of Legal Advisers
- 26 Viled Fashion LLP