DATA AND CALL CENTERS REPORT







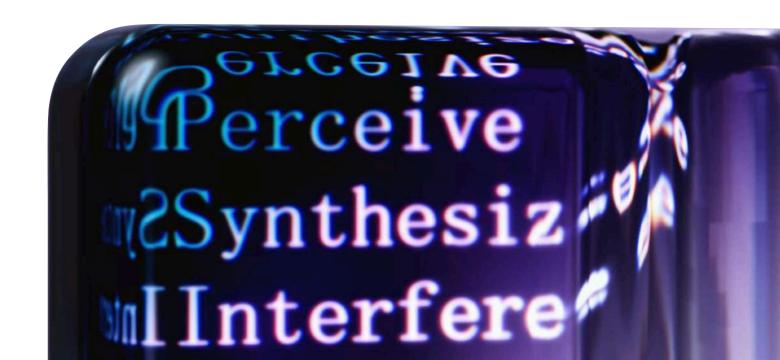
EXECUTIVE SUMMARY

The global call center industry and the data center sector both form critical components of today's digital economy. On a worldwide scale, call centers have evolved into crucial customer engagement hubs, utilizing omnichannel platforms, Al-driven solutions, and cloud-based infrastructures to meet increasing consumer demands. Simultaneously, data centers serve as the technological backbone supporting these services — ensuring swift data processing, robust storage, and reliable connectivity for emerging trends like cloud computing, IoT, and Al-driven analytics.

Central Asia: Regional Overview

In Central Asia, specifically in countries such as Kazakhstan, Uzbekistan, and Kyrgyzstan, both call centers and data centers are making strides but remain in relatively early stages of development compared to global standards. While Kazakhstan leads the region in terms of government-backed initiatives and technological adoption, Uzbekistan and Kyrgyzstan are gradually enhancing their digital infrastructures. However, many data centers are still operating in repurposed spaces, and both sectors require continued investment and strategic planning to reach international benchmarks. As these markets mature, the synergy between advanced data centers and efficiently run call centers will be pivotal in solidifying Central Asia's position in the global digital landscape.

According to recent insights highlighted by Cushman & Wakefield UK, power availability has become the primary consideration for data center operators worldwide, with companies facing extended wait times for reliable energy and increasingly turning to renewable sources and new technologies to meet their needs. This trend extends beyond major hubs and into emerging markets, including Central Asia — particularly Kazakhstan, Uzbekistan, and Kyrgyzstan — where access to stable, scalable power will be crucial as these countries position themselves as competitive data center destinations.



A DATA CENTER is a facility designed to house server and network equipment, ensuring their continuous operation and connection to the internet. They provide stable and uninterrupted operation of hosted equipment, offering protected communication channels for data exchange. Clients benefit financially by renting space or server equipment in existing data centers, eliminating the need to invest in separate premises, costly equipment, and specialized personnel.

Data centers are classified into four tiers, based on their operational reliability and fault tolerance, as defined by the Uptime Institute. These tiers provide a framework for understanding the level of service, uptime, and redundancy offered by a facility, allowing businesses to align their infrastructure needs with operational priorities.



The most basic level of reliability, designed for small businesses with non-critical workloads that can tolerate occasional downtime. This tier offers limited redundancy and has a fault tolerance of 99.67%, equating to up to 28.8 hours of potential downtime per year. While cost-effective, Tier I facilities are considered outdated and unsuitable for modern, high-demand operations.



Offers enhanced reliability, making it a viable option for medium-sized businesses seeking improved infrastructure without fully eliminating risks of downtime. Facilities in this category feature redundant power and cooling systems, resulting in a fault tolerance of 99.75%, or approximately 22 hours of downtime annually. While an improvement over Tier I, it still falls short of meeting the needs of mission-critical operations.

Provides a significant leap in reliability and is well-suited for enterprises requiring 24/7 availability. With a fault tolerance of 99.98%, corresponding to less than 1.6 hours of downtime per year, this tier strikes an effective balance between cost and reliability, making it a preferred choice for industries such as e-commerce, telecommunications, and cloud services.



Represents the pinnacle of data center reliability, designed for organizations in sectors where uninterrupted service is critical, such as finance, healthcare, and military operations. These facilities feature complete system duplication with dual redundancy, achieving a fault tolerance of 99.99%, or less than 0.5 hours of downtime annually. While Tier IV requires significant financial investment, it ensures maximum operational stability and is often indispensable for high-stakes applications.



KEY COMPONENTS OF A DATA CENTER INCLUDE:



POWER SUPPLY:

Multiple independent inputs, uninterruptible power supplies, and backup generators ensure continuous operation.



COOLING:

Advanced air conditioning systems prevent overheating of equipment.



SECURITY:

Multi-level security measures, including surveillance and access control, protect against unauthorized access.



FIRE SUPPRESSION:

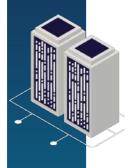
Systems using inert gases extinguish fires without damaging equipment.



TYPES OF DATA CENTERS

ENTERPRISE DATA CENTERS:

Owned and operated by a single organization, typically large companies, to support their internal operations. These are custom-built to meet specific needs, offering maximum control over infrastructure and data security.



COLOCATION DATA CENTERS:

Facilities that lease space, power, and cooling to multiple businesses. These centers provide shared resources while allowing companies to maintain their own servers and equipment.



CLOUD DATA CENTERS:

Operated by third-party providers such as Amazon Web Services, Microsoft Azure, or Google Cloud. These centers offer scalable, on-demand services where businesses pay only for what they use.



EDGE DATA CENTERS:

Smaller facilities located closer to users to reduce latency and improve performance, often supporting IoT and real-time applications.

DATA CENTERS

Kazakhstan

Kazakhstan's digital transformation journey has rapidly gained momentum in recent years, shaping the country into a growing hub for data infrastructure. Currently, there are 51 operational data centers across the nation, reflecting significant advancements in the sector. Over the past five years, the number of rack spaces in the country's data centers has approximately doubled. The overall utilization rate of data centers in the republic is about 76%, while in state-owned infrastructure, this figure reaches 97%.

Several data center construction projects are currently underway in Kazakhstan. Specifically, JSC Kazteleport is building a data center with a capacity of 200 racks, while Infrastructure Kazakhstan LLP is developing a facility with 4,000 racks.

The data center market remains reactive, driven by current customer demand rather than proactive investments to create surplus or competitive offerings. This reflects the market's early stage, where providers focus on meeting immediate needs rather than fostering future growth. The current data center (DC) market in Kazakhstan is dominated by state-owned and quasistate companies. Key players include JSC "National Information Technologies" (NIT), which hosts the data for all government information systems, and JSC "Kazakhtelecom," which owns a significant number of racks in its data centers.

In March 2024, a new major player entered the market — Freedom Telecom, a subsidiary of Freedom Holding Corp. The company finalized a deal with JSC "Transtelecom" to acquire seven data centers located in various cities across Kazakhstan, including Uralsk, Aktobe, Atyrau, Aktau, Karaganda, Zhezkazgan, and Kyzylorda.

Kazakhstan is advancing its digital infrastructure by planning a \$500 million data center to support AI services and attract global tech giants like Google and Microsoft. Discussions are underway with Microsoft to establish an Azure data center in the country, enhancing cloud capabilities and applying AI solutions to improve government services. This initiative aligns with President Tokayev's goal to position Kazakhstan as an IT hub and boost IT service exports to \$1 billion by 2026. These developments aim to transform the nation into a key player in the global digital economy.

The state is not only the primary provider of data center services but also its largest consumer. The development of e-government requires substantial computing power to support various public services. Meanwhile, small and medium-sized enterprises (SMEs) are beginning to recognize the benefits of cloud services, which enable efficient resource allocation and reduce infrastructure costs. For startups, cloud solutions are particularly attractive as they allow businesses to focus on growth without significant investments in their own IT resources.

UPTIME INSTITUTE AWARDS IN KAZAKHSTAN

Client	Location	Project	Certification
JSC Transtelecom	Astana	NQZ Data Center TTC	TIER III Certification of Design Documents
JSC Transtelecom	Astana	NITEC Data Center	TIER III Certification of Design Documents TIER III Certification of Constructed Facility
KazTelePort	Almaty	Kazteleport Sairam Data Center	TIER III Certification of Design Documents TIER III Certification of Constructed Facility
KazTelePort	Astana	Yereymentau Data Center	TIER III Certification of Design Documents TIER III Certification of Constructed Facility
KazakhTelecom	Pavlodar	Pavlodar Data Center	TIER III Certification of Design Documents TIER III Certification of Constructed Facility
National Bank of Kazakhstan	Astana	Backup Center	TIER III Certification of Design Documents
North Caspian Operating Company N.V.	Atyrau	NCOC Atyrau Data Center	TIER III Certification of Design Documents TIER III Certification of Constructed Facility TIER III Silver Certification of Operational Sustainability

Kazakhstan is strengthening its position as a regional leader in digital infrastructure by upgrading its data centers and global connectivity. These certifications enhance client trust and solidify Kazakhstan's credibility in the regional market.

In parallel, Kazakhstan is advancing its global digital connectivity through the Trans-Caspian Fiber-Optic Cable Project (TCFO). This initiative, set for completion by 2025, involves the construction of a 370-kilometer fiber-optic cable along the bottom of the Caspian Sea, with an investment of approximately \$50.8 million. The submarine optical fiber transmission system will connect the Kazakhstani town of Aktau with Sumgait in Azerbaijan, offering a maximum capacity of 400 terabits per second, as stated by Bagdat Musin, CEO of Kazakhtelecom. This project aims to directly link Europe and Asia, bypassing traditional routes, improving data transmission speeds, and reducing latency. Furthermore, it will integrate Kazakhstan into the broader Digital Silk Road initiative, attracting foreign investment and fostering regional cooperation.

Complementing this connectivity project, Kazakhstan is planning the construction of two new data centers under the management of Freedom Telecom, strategically linked to the TCFO pathway. The primary facility will be located in G4 City near Kunayev, spanning 1,300 hectares with a capacity of 100 MW, designed to support hyperscalers and advanced technologies like artificial intelligence. A second facility is planned in Aktau, further strengthening the country's geographic redundancy and regional capacity. Together, these data centers and the TCFO project will enhance Kazakhstan's role as a key digital hub, supporting growing global and regional data traffic demands while solidifying its position in the digital economy.

DATA CENTERS

Uzbekistan

Uzbekistan's data centers market is in the early stages of development, driven by the government's efforts to accelerate digital transformation and enhance the country's IT infrastructure. The "Digital Uzbekistan 2030" strategy aims to modernize the national economy through digitalization, encouraging investments in data centers and related technologies. This initiative is fostering a growing demand for reliable IT infrastructure to support e-government, financial services, telecommunications, and private sector operations.

Uzbekistan's data center market is steadily developing, with most facilities being state-owned or operated by telecommunications companies, highlighting the significant role of public sector initiatives in shaping the industry. Among the notable facilities is the Uzbektelecom data center in Tashkent, one of the largest in the country, which serves as a critical hub for hosting governmental and corporate data. While there are additional regional centers, their capacities remain relatively modest, reflecting the ongoing need for further investment and expansion to meet growing demand.

Most data centers in Uzbekistan operate as owned facilities, where state institutions or large organizations manage their infrastructure independently. However, there is a gradual emergence of colocation facilities offering space and services to multiple clients. This shift is driven by the need for cost-effective and scalable solutions, especially for SMEs and private companies seeking to modernize their IT systems without significant capital investment.

A significant factor contributing to the growth of Uzbekistan's data center market is the introduction of a regulation requiring the storage and processing of personal data for Uzbekistan citizens to be carried out exclusively within the country. This requirement, effective from April 1, 2021, has compelled businesses such as e-commerce platforms, loyalty program operators, social media platforms, and other companies working with personal data to transfer their information to servers located on Uzbek territory.

In 2023, the data center market in Uzbekistan experienced expansion, driven by increasing demand from businesses and the growing use of digital services. Sectors such as online banking, e-commerce, and streaming platforms have seen rapid adoption, significantly boosting the need for reliable and scalable data storage solutions. This combination of regulatory compliance and the surge in digital activity has positioned the market for further development, paving the way for future investment and innovation in the country's IT infrastructure.

UPTIME INSTITUTE AWARDS IN UZBEKISTAN

Client	Location	Project	Certification
JSC Uzbektelecom	Akhangaran	Uztelecom DC2	TIER III Certification of Design Documents
Uzbekistan State Institution "E-Government Project Management Center"	Tashkent	DC E-GOV Solnechniy	TIER III Certification of Design Documents

Several noteworthy projects, some still under construction or recently completed, are poised to significantly boost the nation's technological capabilities. A prominent example is the joint project between the Uzbek telecommunication firm East Telecom and the South Korean company Korea Telecom. This initiative involves the construction of a cutting-edge data processing center designed to meet international reliability and security standards. According to announcements made by the involved parties, this state-of-the-art facility will host advanced computing and networking equipment, aiming to serve as a critical hub for national data management. Once active, it is expected to bolster the country's capacity to handle increasing data loads, support local enterprises, and enhance the reliability of online services.

The second major project is led by Saudi company DataVolt, which began construction of a data center in May 2024 at Tashkent's IT Park. This facility will have an initial capacity of 10 MW, with further expansions planned across Uzbekistan, including a 250 MW facility in New Tashkent and a 40 MW center in Bukhara, scalable to 250 MW. DataVolt's projects emphasize sustainability, relying on renewable energy sources.

These data centers aim to bolster digital infrastructure while attracting global IT companies to Uzbekistan's growing technology ecosystem these developments, Uzbekistan currently has only two data centers certified at Tier III by the Uptime Institute, reflecting the nascent stage of high-standard data center deployment in the country. This certification highlights facilities capable of maintaining nearly uninterrupted operations, a crucial benchmark for modern data centers.

DATA CENTERS

Kyrgyzstan

Kyrgyzstan's data center market is in its infancy, with limited infrastructure and a slow pace of development compared to its neighboring countries. Despite these challenges, the country is making efforts to build its digital economy by enhancing connectivity and establishing foundational IT infrastructure.

At present, Kyrgyzstan has only a few operational data centers, primarily located in Bishkek, the capital and main economic hub. These facilities are small-scale and cater mainly to local businesses, telecommunications companies, and government institutions. The existing data centers often serve as multi-functional hubs, offering a mix of colocation, cloud services, and basic IT support.

The majority of these facilities are owned by local telecommunication companies or government-related entities. Independent commercial data centers are rare, reflecting limited private sector investment in this field.

One of the most significant milestones was the opening of the NSP Data Center in February 2018 in Bishkek. As the first commercial data center in Kyrgyzstan, it marked a major step in advancing the country's IT capabilities. The facility spans 500 square meters and can house up to 80 server racks, with a total power capacity of 300 kW, expandable to 500 kW.

In early June 2024, the Russian-Kyrgyz Development Fund (RKDF) announced the opening of the first commercial Tier III data center in Bishkek, claimed to meet Uptime Institute standards for reliability. This marked a significant milestone, as previously, the only Tier III-certified facility in Kyrgyzstan was operated by the National Bank of the Kyrgyz Republic. However, a review of Uptime Institute's public certification database indicates no official Tier III certification has been issued for this facility to date. The new data center provides government agencies and corporate businesses in Kyrgyzstan with a reliable option for hosting IT equipment and services.

The data center is operated by DataTime, an engineering company specializing in designing and maintaining high-reliability infrastructure. The facility has the capacity to house 100 server racks with a total power output exceeding 500 kW. Plans are already in place to expand this capacity by an additional 20 racks in the future.

UPTIME INSTITUTE AWARDS IN KYRGYZSTAN

Client	Location	Project	Certification
National Bank of the Kyrgyz Republic (NBKR)	Bishkek	Data Centre of National Bank of the Kyrgyz Republic	TIER III Certification of Design Documents TIER III Certification of Constructed Facility

G-Cloud, short for Government Cloud, is an initiative by the government of Kyrgyzstan to centralize and optimize IT infrastructure for public administration. The project is part of the country's broader efforts to digitalize governance, improve service delivery, and enhance the efficiency of state institutions. The system will serve as the backbone for Kyrgyzstan's egovernment initiatives, enabling seamless access to digital services for citizens, businesses, and public institutions.

Looking ahead, Kyrgyzstan has ambitious plans to further expand its data center capabilities. Under the Digital CASA program, a new state data center is planned for Bishkek, with a budget of \$19 million. This facility is intended to serve government and municipal institutions, aiming to improve the efficiency and reliability of public IT services. The project is supported by the World Bank and the International Development Association, highlighting international collaboration in the country's digital transformation.

These developments demonstrate Kyrgyzstan's commitment to strengthening its digital infrastructure. While challenges remain, such as limited private sector involvement and energy supply issues, the ongoing projects signal a growing recognition of the importance of data centers in driving economic growth and technological innovation.

CALL CENTERS are centralized platforms where trained agents handle inbound and outbound communications — primarily via phone calls, but often also through email, live chat, and social media. They serve as vital touchpoints between businesses and their customers, enabling timely and efficient responses to inquiries, technical issues, complaints, and sales opportunities. By streamlining customer interactions, call centers help companies improve customer satisfaction, maintain brand reputation, and optimize operational costs.

In today's highly competitive and globalized marketplace, the value of call centers is particularly pronounced. They can manage large volumes of customer interactions, ensure consistent service quality, and quickly address client needs. This efficiency allows businesses to strengthen customer loyalty, enhance revenue, and stay ahead of competitors. Moreover, call centers often provide multilingual support and culturally attuned service, which is crucial for organizations targeting international markets or geographically dispersed customer bases.



TYPES OF CALL CENTERS

BY CALL TYPE:

Inbound: Customers initiate the calls themselves, and the center's role is to answer questions and address issues (e.g., customer support).

Outbound: Operators proactively reach out to customers (e.g., for surveys or promotional campaigns).

Blended: The center both receives calls and makes outgoing ones (e.g., an online store handling support calls as well as making marketing calls).

BY TECHNICAL CONFIGURATION:

On-Premises: All equipment is located on the company's own premises.

Cloud-Based: The company rents remote servers and phone lines. Operators need only an internet connection and can work remotely.

BY ORGANIZATIONAL MODEL:

In-House: The company manages its own team of operators and maintains all equipment.

Outsourced: A third-party call center provides operators, infrastructure, and services. The hiring company supplies a knowledge base detailing products, services, and common customer questions and answers.

CALL CENTERS

Kazakhstan

The call center market in Kazakhstan is rapidly growing, driven by increasing demand for efficient customer service solutions. Many businesses are turning to outsourcing as a strategic approach to streamline operations. Outsourcing allows companies to focus on their core activities while reducing the expenses associated with maintaining in-house call centers. Most of companies in Kazakhstan rely on outsourced call center services, demonstrating the effectiveness of this model in driving business growth and resource optimization.

Modern call centers in Kazakhstan are adopting an omnichannel approach, providing customer support through various platforms such as phone, social media, messaging apps, and email. This ensures flexibility and faster response times, significantly enhancing customer satisfaction. Furthermore, the integration of advanced technologies such as automated calling systems, chatbots, and CRM platforms is improving operational efficiency and the overall quality of service.

The call center market is also benefiting from the significant expansion of cloud infrastructure in Kazakhstan. The growing adoption of cloud services reflects an increasing reliance on digital solutions, which play a crucial role in supporting the development of call center technologies and enhancing operational efficiency.

Outsourcing call center services offers several advantages for businesses. It eliminates the need to invest in costly equipment, staff training, and management of internal operations, resulting in significant cost savings. Specialized providers deliver high-quality service through their expertise and advanced systems, ensuring better customer experiences. Additionally, outsourced call centers are flexible and scalable, allowing businesses to adapt quickly to changing demands and expand services as needed.

KEY PLAYERS IN THE MARKET

7line: A leading outsourcing contact center with over seven years of experience, specialising in inbound call handling for major clients. The company processes up to 20,000 calls daily and offers services such as telemarketing, quality control, and surveys.

SMTER: Ranked among the top 10 largest call centers in Kazakhstan, SMTER provides a full range of services, including hotlines, virtual receptionists, IVR menus, telemarketing, technical support, and IT outsourcing. The company employs 1,800 specialists and has completed over 2,000 projects.

Telecontact: This experienced provider offers inbound and outbound call services, interaction management, back-office support, and integration solutions. Telecontact leverages omnichannel communication and speech analytics to deliver superior customer service.

Leading providers are setting benchmarks in service quality and technological innovation, enabling businesses to enhance customer satisfaction and operational efficiency. As the market continues to evolve, the integration of advanced technologies and omnichannel support will further solidify its role in Kazakhstan's digital economy.

CALL CENTERS

Uzbekistan

The call center market in Uzbekistan is steadily growing, many businesses are integrating call centers into their operations to optimize processes and enhance customer interactions.

One of the key trends in Uzbekistan is the rising demand for outsourced call center services. Companies are increasingly turning to specialized providers, enabling them to focus on core business activities while reducing operational costs.

Modern call centers in Uzbekistan are also embracing omnichannel communication strategies. Additionally, the adoption of advanced technologies, such as automated systems, chatbots, and CRM platforms, is enhancing the efficiency and quality of customer service.

The leading players in Uzbekistan's call center market include UniCall, known for its comprehensive customer support services, and Telecontact, a well-established provider with a strong presence in the region. These companies are setting the benchmark for quality and innovation in the industry, supporting businesses across various sectors.

Recent Developments

In March 2024, MPlus, a global business outsourcing company, announced plans to establish a remote call center in Uzbekistan. This facility aims to employ between 60 to 600 agents, providing services to partners in Russia, Arab countries, and the European Union. The initiative is expected to bolster the country's outsourcing sector and create numerous job opportunities.

In the banking sector, significant improvements have been made to enhance customer support. As of October 2024, commercial banks in Uzbekistan have extended their call center operations to a 24/7 schedule. This change ensures that customers can report lost or misused cards at any time, with operators promptly blocking compromised cards upon request.

These developments reflect Uzbekistan's commitment to advancing its call center infrastructure, leveraging both private sector initiatives and government reforms to enhance customer service across various industries.

CALL CENTERS

Kyrgyzstan

The call center market in Kyrgyzstan is gradually developing, driven by the increasing demand for enhanced customer service across various sectors. However, the industry remains in its early stages, with limited large-scale operations and infrastructure.

Market Overview

Kyrgyzstan's call center industry is characterized by a few key players offering outsourced customer support services. One notable example is Positive Contact, a professional call center that handles over 50,000 calls daily, serving clients from Russia and other CIS countries. The center operates 200 operator stations and utilizes the Naumen Contact Center platform to manage communications across multiple channels, including voice calls, emails, SMS, and web chats.

Another significant player is CRM Technologies, which has implemented various call center projects in Kyrgyzstan. Their portfolio includes collaborations with companies like Aknet, Gazprom Kyrgyzstan, and BTA Bank, focusing on integrating text-based call centers, omnichannel contact centers, and updating telecommunication infrastructures.

Recent Developments

In 2023, MegaCom, a leading telecommunications operator, expanded its customer service capabilities by enhancing its contact center operations. The company operates approximately 70 sales and service centers and maintains a 24/7 contact center to assist subscribers, reflecting a commitment to improving customer engagement.

Additionally, Kyrgyztelecom, the national telecommunications provider, announced plans to launch a Data Processing and Storage Center. This initiative aims to offer hosting services, colocation, and virtual server space, which could support the development of more sophisticated call center operations in the future.

Operating costs for call centers in Kyrgyzstan are generally lower compared to neighboring countries like Kazakhstan and Uzbekistan. Factors contributing to this include more affordable labor and operational expenses, making Kyrgyzstan an attractive location for establishing call center operations.

Despite these developments, the call center industry in Kyrgyzstan faces challenges such as limited infrastructure, a need for advanced technological integration, and a relatively small pool of skilled professionals. Addressing these issues is crucial for the sector's growth and competitiveness.

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